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Home Textiles

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TABLE OF CONTENTS

Page

AT THE MANUFACTURER LEVEL:

MARKET TRENDS.......... 1
GENERAL STATISTICS ON THE INDUSTRY.......... 2
  EMPLOYMENT & EARNINGS.......... 4
  OPERATING RATIOS.......... 5
  LEADING MANUFACTURERS.......... 7
  BY REGION.......... 8
PRODUCTION.......... 9
MATERIALS CONSUMED IN PRODUCTION.......... 12
SHIPMENTS.......... 15
  BY GEOGRAPHIC AREA.......... 20
PRODUCER PRICE TRENDS.......... 22
FOREIGN TRADE -- IMPORTS.......... 22
FOREIGN TRADE -- EXPORTS.......... 24

AT THE RETAIL LEVEL:

THE POTENTIAL MARKET.......... 27
RETAIL SALES BY PRODUCT.......... 29
RETAIL SALES BY TYPE OF OUTLET.......... 31
CONSUMER PRICE TRENDS.......... 36
CONSUMER BUYING HABITS.......... 37

SCHEDULE OF ADDITIONAL FACT FILES.......... 41

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HOME TEXTILES

Market Trends

Home textiles represented an estimated $10.3 billion volume at retail in 1981, according to HFD - Retailing Home Furnishings Textiles Report (May 17, 1982). The market for home textiles has fared better than many other categories during the 1981-82 recession. National Panel Diary (NPD), a market research firm utilizing consumer panels, reported that dollar sales of home textiles increased 6.9% for the 12 month period ended June 1982 compared with the previous 12 months, on a unit sales rise of 1.3%.

Several factors account for the increase. Because in the current recession people have less discretionary income to spend on entertainment, there has been a renewed interest in the home. Home textiles are an inexpensive way to spruce up the home environment. Secondly, more people are choosing to redecorate their homes rather than buy new ones due to the high mortgage rates of the period.

There is also less price-cutting in the home textiles market than in some others because of the large amount of custom items and exclusive collections sold. Realizing that designer collections are one way to avoid price competition and maintain mark-ups, some retailers and manufacturers have signed exclusive contracts with designers for a line of home textiles. Notables such as Halston (with J.C. Penney), Diane Von Furstenberg (with Sears) and Ralph Lauren (with J.P. Stevens) have recently agreed to create home textiles collections.

Manufacturers and retailers constantly court consumers by offering new products, colors, designs and fabrications in the home textiles market. For example, the mini-blind market, estimated by HFD at $750 million at retail in 1981, is expected to grow at a 40% growth rate in the next 2 years. Most of this growth will come from the sale of stock mini-blinds, which were not previously available. Energy saving window treatments, such as retractable shutters, outside blinds and sky light coverings, are also expected to contribute to category sales.

For 1983, the Color Marketing Group expects new emerging colors -- yellow (because it can be used singly or in combination with many other colors) and rose pink -- to become more important to the industry. Another important direction is the graying of many of the shades already on the market.

Many industry sources feel that the shop-at-home custom home textiles market, currently estimated at over $2 billion, will gain significantly in the years ahead, despite the advent of electronic shopping at home. The one thing that will not change, and makes shop-at-home important, is that the buyer will still insist on seeing the merchandise against the backdrop of the home prior to purchase.

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census -- the most recent covering the year 1977. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Based on estimates resulting from the 1980 Annual Survey of Manufacturers, the value of industry shipments (including both primary and secondary products and miscellaneous receipts) produced by manufacturers classified in the curtain and draperies industry reached $1.053 billion, a small 0.3% increase over the 1979 shipment value of $1.050 billion.

As defined on the following page, the home textiles, not elsewhere classified (n.e.c.) industry classification covers a wide range of items. In 1980, the value of industry shipments was estimated at $2.6 billion, up 4.0% over 1979.

A profile of the drapery hardware, blinds and shades industry is included in this Fact File as sales at retail represent a significant share of curtain and drapery department operations. This industry shipped $958.4 million worth of goods in 1980, 8.9% more than in 1979.

Curtains & Draperies
(SIC 2391*)

	1980	1979	1978	1977
Number of companies	na	na	na	1,650
Number of establishments	na	1,430	1,530	1,712
Number with 20 or more employees	na	321	323	324
Employees, total (thous.)	27.4	31.3	34.5	31.7
Production workers (thous.)	23.7	27.2	29.1	27.2
Payroll (mil. $)	$ 228.5	$ 245.3	$ 247.7	$ 224.7
Value added by manufacture (mil. $)#	444.0	488.3	425.6	407.3
Value of industry shipments (mil. $)##	1,053.4	1,050.2	1,081.4	1,013.1
Capital expenditures, new (mil. $)	11.8	15.7	15.7	7.2

Home Textiles, n.e.c.
(SIC 2392*)

	1980	1979	1978	1977
Number of companies	na	na	na	980
Number of establishments	na	862	937	1,051
Number with 20 or more employees	na	388	396	403
Employees, total (thous.)	44.0	46.4	50.2	47.5
Production workers (thous.)	36.7	38.8	42.4	39.8
Payroll (mil. $)	$ 416.7	$ 407.5	$ 411.4	$ 366.4
Value added by manufacture (mil. $)#	969.2	916.4	827.3	782.9
Value of industry shipments (mil. $)##	2,600.1	2,502.4	2,417.6	2,294.0
Capital expenditures, new (mil. $)	16.4	27.9	28.1	26.9

GENERAL STATISTICS ON THE INDUSTRY

Drapery Hardware, Blinds & Shades
(SIC 2591*)

	1980	1979	1978	1977
Number of companies	na	na	na	435
Number of establishments	na	393	417	456
Number with 20 or more employees	na	101	78	85
Employees, total (thous.)	15.7	15.5	15.4	13.6
Production workers (thous.)	11.0	11.6	11.7	10.3
Payroll (mil. $)	$ 199.4	$ 194.9	$ 172.6	$ 145.6
Value added by manufacture (mil. $)#	458.2	438.4	431.8	345.0
Value of industry shipments (mil. $) ##	958.4	879.9	834.1	675.1
Capital expenditures, new (mil. $)	24.0	26.6	19.7	16.7

n.e.c. = not elsewhere classified
n.a. = not available

* SIC (Standard Industrial Classification) covers establishments primarily engaged in manufacturing curtains and draperies from purchased materials.

* SIC 2392 (officially designated "House Furnishings, n.e.c.") covers establishments primarily engaged in manufacturing of home textiles from purchased materials, including towels, sheets, blankets, comforters, bedspreads, pillowcases, pads; also slip covers, tablecloths (fabric and plastic), pillows, mops, garment bags, etc. Blankets that are made in weaving mills are not included in this industry, nor are tufted bath mats or other tufted items.

* SIC 2591 covers establishments primarily engaged in manufacturing curtain and drapery rods, poles and fixtures, venetian blinds and other window blinds and shades, regardless of the materials used, except canvas shades and awnings.

**Each business location is counted as a separate establishment. 1978 and 1979 data on number of establishments includes only those with payrolls.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries, is covered on pages 15 and 16.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1978, 1979, 1980
County Business Patterns 1978, 1979.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Total employment in the curtains & draperies industry dropped 1.4% in 1981 to 26.9 thousand and further declined to an average 25.1 thousand over the first seven months of 1982. In the home textiles, n.e.c. classification, total employment fell to an average 48.9 thousand persons, down 2.4% from the 1980 level. During the January - July period, employment in this industry averaged 45.9 thousand in 1982 and 47.4 thousand in 1981.

Production workers in the curtains & draperies industry worked an average of 36.7 hours a week (excluding overtime) in 1981 compared with 36.0 in 1981, a 1.9% increase. During the same period, hourly earnings gained 8.9% to $4.40. For production workers in the home textiles, n.e.c. industry, weekly earnings averaged $188.37 on a typical pay scale of $4.88 per hour (up 8.7% over 1981) and an average 38.6 hour work week (up 1.8% over 1981).

Employment & Earnings in the Home Textiles Industry

	January-July		Annual Average		% Change
	1982	1981	1981	1980	1981/1980
Curtains & draperies (SIC 2391)					
All employees (thous.)	25.1	26.0	26.9	27.2	- 1.1%
Production workers (thous.)	20.4	21.7	22.4	22.9	- 2.2
Avg. weekly earnings	$ 154.63	$ 159.17	$ 161.48	$ 145.44	+ 11.0
Avg. hourly earnings	4.64	4.34	4.40	4.04	+ 8.9
Avg. weekly hours	33.3	36.6	36.7	36.0	+ 1.9
Home textiles, n.e.c. (SIC 2392)					
All employees (thous.)	45.9	47.4	48.9	50.1	- 2.4
Production workers (thous.)	37.9	39.1	40.2	41.2	- 2.4
Avg. weekly earnings	$ 187.17	$ 187.17	$ 188.37	$ 170.17	+ 10.7
Avg. hourly earnings	5.14	4.79	4.88	4.49	+ 8.7
Avg. weekly hours	36.4	38.3	38.6	37.9	+ 1.8

n.e.c. = not elsewhere classified.

Source: Bureau of Labor Statistics,
Employment & Earnings Supplement,
June 1982, September 1982.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Number of Home Textiles Manufacturing Establishments
By Employment Size, 1979

	Curtains & Draperies (SIC 2391)		Home Textiles, n.e.c. (SIC 2392)		Drapery Hardware, Blinds & Shades (SIC 2591)	
	No.	% of Total	No.	% of Total	No.	% of Total
Total establishments*	1,430	100.0%	862	100.0%	393	100.0%
Employment Size:						
Under 10 employees	881	61.6	323	37.5	240	61.1
10-49 employees	420	29.4	313	36.3	104	26.5
50-249 employees	109	7.6	188	21.8	34	8.6
250 or more employees	20	1.4	38	4.4	15	3.8

n.e.c. = not elsewhere classified.
* Includes only establishments with payrolls.

Source: U.S. Bureau of the Census,
County Business Patterns 1979.

Employment & Share of Industry Shipments in Large Plants
In the Home Textiles Industry, 1981

	Number of Plants		% of Industry Shipments Accounted For By Plants With 100 or More Employees
	With 20+ Employees	With 100+ Employees	
Curtains & draperies (SIC 2391)	339	73	60%
Home textiles, n.e.c. (SIC 2392)	347	98	66
Drapery hardware, blinds & shades (SIC 2591)	137	28	70

n.e.c. = not elsewhere classified.

Source: *Sales & Marketing Management*,
"Survey of Industrial Purchasing Power,"
April, 1982. All rights reserved.

Operating Ratios

In 1977, the 50 largest companies in the drapery hardware, blinds and shades industry accounted for over 88% of the total value of shipments from all 435 companies classified in this industry. In the home textiles, n.e.c. industry, 5.1% of the companies (50 of 980) were responsible for 65.5% of all shipments while in the curtains & draperies industry, 61.6% of all shipments came from 50 of the 1,650 companies primarily engaged in producing curtains & draperies.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Concentration Ratios in the Home Textiles Industry, 1977

	Value of Shipments (Mil.$)	Percent Accounted For By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Curtains & draperies (SIC 2391)	$ 1,013.1	25.7%	35.7%	48.9%	61.6%
Home textiles, n.e.c. (SIC 2392)	2,294.0	22.0	33.4	47.9	65.5
Drapery hardware, blinds & shades (SIC 2591)	675.1	45.5	64.6	81.0	88.6

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing,
MC77-SR-9.

Manufacturing Ratios in the Home Textiles Industry, 1980
(Median Results)

	Curtains & Draperies (SIC 2391)	Home Textiles n.e.c. (SIC 2392)	Drapery Hardware, Blinds & Shades (SIC 2591)
Number of firms reporting	204	176	78
Current assets to current debt (times)	2.61	1.85	2.75
Net profit on net sales (percent)	6.06%	1.89%	5.79%
Net profit on net worth (percent)	24.02%	17.45%	25.04%
Net sales to net worth (times)	5.13	6.44	4.67
Net sales to inventory (times)	11.7	7.1	9.8

n.e.c. = not elsewhere classified.

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
Key Business Ratios 1980.
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GENERAL STATISTICS ON THE INDUSTRY

Leading Manufacturers

Leading Curtain & Drapery Manufacturers, 1980

	Estimated Wholesale Sales (Mil. $)
Burlington House Draperies	$ 150
Aberdeen (Louis Hand & Savoy)	75-80
Home Curtain	70-80
Max H. Kahn Curtain	50
Rennie Curtain	45-50
Miller Curtain	40
Robertson Factories	40
S. Lichtenberg	40
Croscil Curtain	35-40
Cameo Curtain	30-35

Source: HFD-Retailing Home Furnishings, December 28, 1981.

Leading Blanket Manufacturers, 1980

	Estimated Units (Mil. Units)	Estimated Wholesale Sales (Mil. $)
Beacon Manufacturing	7.0+	$ 40
Owens Manufacturing	5.0	17
Chatham Manufacturing	4.0	27
Manetta Mills	4.0	20
Bibb Co.	4.0	16
Fieldcrest Mills	3.0	20
Lebanon Mills	2.0	16+

Source: HFD-Retailing Home Furnishings, October 26, 1981.

GENERAL STATISTICS ON THE INDUSTRY

By Region

Leading Manufacturing States in Home Textiles & Related Products, 1977

	Number of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Curtains & draperies (SIC 2391),				
U.S. total	1,712	324	$ 407.3	$ 1,013.1
Leading States:				
California	389	56	52.2	110.5
New York	175	41	54.5	163.3
Florida	133	8	11.4	23.8
Texas	109	17	24.0	75.2
Massachusetts	49	28	9.7	98.8
North Carolina	33	17	46.1	140.0
Leading states, total	888	167	197.9	611.6
Percent of U.S. total	51.9%	51.5%	48.6%	60.4%
Home textiles, n.e.c. (SIC 2392),				
U.S. total	1,051	403	782.9	2,294.0
Leading States:				
New York	272	85	124.8	356.2
California	123	39	64.1	145.3
Illinois	68	30	49.5	116.4
New Jersey	62	31	58.6	141.7
Georgia	44	27	73.3	287.0
North Carolina	41	24	84.1	305.5
South Carolina	19	13	56.7	200.7
Alabama	19	9	56.6	205.4
Leading states, total	648	258	567.7	1,758.2
Percent of U.S. total	61.7%	64.0%	72.5%	76.6%
Drapery hardware, blinds & shades				
(SIC 2591), U.S. total	456	85	345.0	675.1
Leading States:				
New York	84	12	20.9	41.2
California	67	14	39.1	75.5
Texas	38	5	7.5	14.9
New Jersey	24	4	20.6	41.1
Maryland	7	3	11.2	37.6

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCTION

The U.S. Bureau of the Census issues quarterly reports on production and shipments of sheets, pillowcases and towels in their Current Industrial Reports series. These reports are based on surveys made among all U.S. firms engaged in the manufacture of these products.

Sheet, towel and pillowcase production declined drastically during the first half of 1982 compared to the same 1981 period. Overall, sheet and pillowcase production was down 16.1% over this time frame. Fitted sheet production fell 17.2%, flat sheets decreased 14.9% and crib sheets were off 16.4% from year-ago levels. U.S. production of pillowcases during the first half of 1982 lagged 16.4% behind the same 1981 period while terry woven towel (finished) production dipped 10.9%.

For the year 1981, sheet and pillowcase production in the U.S. fell a slight 0.2% compared with 1980 to 31.8 thousand dozen. Flat and fitted sheet production rose 1.7% and 1.1%, respectively, but crib sheet (-4.8%) and pillowcase (-1.7%) production declined. Finished terry woven towel output increased 2.2%.

Production of Sheets, Pillowcases & Towels 1980, 1981

	Quantity (Thous. Doz. Units)		
	1981	1980	% Change 1981/1980
Sheets & pillowcases, total	31,853	31,919	- 0.2%
Crib size sheets	661	694	- 4.8
Other sheets	16,771	16,531	+ 1.4
By type:			
Flat sheets	10,102	9,932	+ 1.7
Polyester/cotton blends	9,722	9,533	+ 2.0
All other fabrics & blends	380	390	- 2.6
Fitted sheets	6,669	6,599	+ 1.1
Polyester/cotton blends	6,355	6,307	+ 0.8
All other fabrics & blends	284	292	- 2.7
Pillowcases, total	14,441	14,694	- 1.7
Polyester/cotton blends	13,781	14,032	- 1.8
All other fabrics & blends	660	662	- 0.3
Finished terry towels, total	44,931	43,957	+ 2.2
By type:			
Sheared	17,283	16,014	+ 7.9
Nonsheared	27,648	27,943	- 1.1
By end use:			
Kitchen	6,140	5,123	+ 19.9
Bath size	21,102	20,146	+ 4.7
Hand, face, guest & fingertip	15,829	16,590	- 4.6
Bath/tub mats	542	469	+ 15.6
All other towels, including larger than bath, i.e. queen/king bath towels, beach towels, etc.	1,318	1,629	- 19.0

(continued)

Production of Sheets, Pillowcases & Towels 1980, 1981
(continued)

	Quantity (Thous. Doz. Units)		
	1981	1980	% Change 1981/1980
Huck & crash towels including dish towels	25,892	27,827	- 6.9%
Terry washcloths	22,670	21,929	+ 3.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels,
MQ-23X(81)-5.

Current production estimates of other types of home textiles, not covered in the U.S. Bureau of the Census reports, are available from the National Cotton Council of America. According to this source, production of curtains made from all types of fabrics rose in 1981 to 108.3 million sets, up 1.6% from 106.6 million sets in 1980. Woven, plastic and non-plastic window shade production declined 15.0% to 39.2 million units in 1981.

U.S. production of blankets and blanketing, measured in linear yards, dropped 9.0% compared with 1980. Drapery, upholstery and slip cover fabrics production increased in 1981 by 2.6% over the previous year.

Production of Selected Home Textiles by Type, 1980, 1981

	Unit of Measure	1981(p)	1980	% Change 1981/1980
Curtains, excluding shower	1,000 sets	108,331	106,596	+ 1.6%
Lace		1,419	1,391	+ 2.0
Other		106,912	105,205	+ 1.6
Cafe, tiered & cottage		60,683	59,493	+ 2.0
Ruffled		5,432	5,173	+ 5.0
Shortie drapes		11,099	10,989	+ 1.0
Tailored		29,698	29,550	+ 0.5
Drapery, upholstery & slip cover fabrics	1,000 lin. yds.	831,073	853,699	+ 2.6
Drapery fabrics		466,840	491,278	- 5.0
Mainly woven		402,465	423,515	- 5.0
Lining, woven		64,375	67,763	- 5.0

(continued)

Production of Selected Home Textiles by Type, 1980, 1981
(continued)

	Unit of Measure	1981(p)	1980	% Change 1981/1980
Upholstery & slip covers fabrics	1,000 lin. yds.	364,233	362,421	+ 0.5%
Coated		69,204	71,760	- 3.6
Knit		20,068	20,810	- 3.6
Woven		49,136	50,950	- 3.6
Uncoated, woven		295,029	290,661	+ 1.5
Window shades, woven, plastic & non-woven	1,000 units	39,161	46,072	- 15.0
Slip covers, furniture, excluding plastic	1,000 units	8,638	8,814	- 2.0
Knit		6,910	7,051	- 2.0
Slip covers		2,764	2,820	- 2.0
Throw covers		4,146	4,231	- 2.0
Woven		1,728	1,763	- 2.0
Slip covers		156	159	- 1.9
Throw covers		829	846	- 2.0
Sleep covers		743	758	- 2.0
Comforters & quilts, excluding filling	1,000 units	12,840	13,237	- 3.0
Bedspreads	1,000 units	29,127	29,245	- 0.4
Tailored		17,869	17,692	+ 1.0
Tufted		3,073	3,088	- 0.5
Woven		8,185	8,465	- 3.3
Jacquard		4,041	5,248	- 23.0
Other woven		4,144	3,217	+ 28.8
Mattress coverings, woven & plastic	1,000 units	2,970	3,000	- 1.0
Pads, quilted, excluding fillings	1,000 units	27,077	27,350	- 1.0
Bassinet, crib & furniture, woven & plastic		5,297	5,350	- 1.0
Mattress, woven		21,780	22,000	- 1.0
Pillows & cushions, excluding fillings, woven	1,000 units	61,388	60,335	+ 1.7
Bed		39,167	37,661	+ 4.0
Decorative		22,221	22,674	- 2.0

(continued)

PRODUCTION

Production of Selected Home Textiles by Type, 1980, 1981
(continued)

	Unit of Measure	1981(p)	1980	% Change 1981/1980
Textile table cloths, napkins & place mats, excluding plastic	1,000 sq. yds.	118,870	112,173	+ 6.0%
Damask		16,644	16,318	+ 2.0
Lace		17,819	16,970	+ 5.0
Other, woven		84,407	78,885	+ 7.0
Coated		21,102	19,721	+ 7.0
Uncoated		63,305	59,164	+ 7.0
Blankets & blanketing	1,000 lin. yds.	81,888	90,012	- 9.0
Bed		74,297	81,761	- 9.1
Thermal woven		19,021	19,467	- 2.3
Cotton		2,024	1,840	+ 10.0
Other		16,997	17,627	- 3.6
Other woven & non-woven		55,276	62,294	- 11.3
Cotton & cotton blends		10,666	11,468	- 7.0
Other		44,610	50,826	- 12.2
Crib & receiving		7,591	8,251	- 8.0
Thermal woven		1,000	1,023	- 2.2
Cotton		105	95	+ 10.5
Other		895	928	- 3.6
Other woven & non-woven		6,591	7,228	- 8.8
Cotton & cotton blends		4,504	4,843	- 7.0
Other		2,087	2,385	- 12.5

(p) = preliminary

Source: National Cotton Council of America,
Cotton Counts Its Customers,
1982 Edition.

MATERIALS CONSUMED IN PRODUCTION

The 1977 census of manufactures report on the home textiles industry included the cost of materials consumed or put into production by plants classified in this industry. Following are findings compared with the previous census data, covering the year 1972.

MATERIALS CONSUMED IN PRODUCTION

Delivered Cost of Materials Consumed in the Production of Home Textiles, 1972, 1977

	Delivered Cost (Mil. $)		
	1977	1972	% Change 1977/1972
Curtains & draperies (SIC 2391)			
Materials, containers & supplies, total	$ 542.2	$ 374.7	+ 44.8%
Broad woven fabrics:			
Cotton	113.3	102.0	+ 11.1
Rayon & acetate	85.8	74.7	+ 14.9
Nylon	11.0	5.3	+107.5
Polyester	101.6	65.4	+118.6
Other broad woven fabrics	41.4		
Plastics products consumed	1.1	na	--
All other materials, containers & supplies, including n.s.k.	188.3	127.3	+ 47.9
Home textiles, n.e.c. (SIC 2392)			
Materials, containers & supplies, total	1,392.6	863.2	+ 61.3
Broad woven fabrics:			
Cotton	401.9	307.9	+ 30.5
Rayon & acetate	33.3	46.0	- 27.6
Nylon	25.3	5.8	+336.2
Polyester	327.5	121.6	+220.2
Other broad woven fabrics	61.9		
Plastics coated, impregnated or laminated fabrics	57.9	29.3	+ 97.6
Man-made fibers (staple & tow)	33.3	20.9	+ 59.3
Other plastics products consumed	26.8	na	--
All other materials, containers & supplies, including n.s.k.	424.7	331.7	+ 11.3

na = not available.
n.e.c. = not elsewhere classified.
n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

Consumption of all types of fibers in curtain production increased 22.8% in 1982 to 89.5 million pounds, according to the Textiles Economics Bureau. Miscellaneous household textiles was the only other category measured by the Bureau which increased its consumption of fibers in 1982.

The amount of fibers used in the manufacture of sheets and other bedding dropped to 504.8 million pounds from 510.7 million pounds in 1981, a 1.2% decline. The biggest decrease in fiber consumption occured in the drapery and upholstery category, which fell 15.0% to 488.7 million pounds.

MATERIALS CONSUMED IN PRODUCTION

Consumption of Fibers in Selected Home Textiles, 1979, 1980

	Millions of Pounds		% Change
	1980	1979	1980/1979
Curtains, total[1]	89.5	72.9	+ 22.8%
Man-made fibers, total	80.1	62.3	+ 28.6
Rayon & acetate	11.5	12.0	- 4.2
Other man-made fibers	68.6	50.3	+ 36.4
Cotton	9.4	10.6	- 11.3
Drapery & upholstery, total[2]	488.7	575.1	- 15.0
Man-made fibers, total	328.8	398.5	- 17.5
Rayon & acetate	128.5	152.5	- 15.7
Other man-made fibers	200.3	246.0	- 18.6
Cotton	148.5	165.1	- 10.0
Wool	11.4	11.5	- 0.9
Bedspread & quilts, total[3]	127.9	137.1	- 6.7
Man-made fibers, total	72.9	76.5	- 4.7
Rayon & acetate	7.5	6.0	+ 25.0
Other man-made fibers	65.4	70.5	- 7.2
Cotton	55.0	60.6	- 9.2
Blankets & blanketing, total[4]	109.1	112.1	- 2.7
Man-made fibers, total	97.2	100.3	- 3.1
Rayon & acetate	2.0	2.1	- 4.8
Other man-made fibers	95.2	98.2	- 3.0
Cotton	7.9	7.3	+ 8.2
Wool	4.0	4.5	- 11.1
Towels & toweling, total[5]	332.8	334.3	- 0.4
Man-made fibers, total	35.3	34.3	+ 2.9
Rayon & acetate	0.9	0.5	+ 80.0
Other man-made fibers	34.4	33.8	+ 1.8
Cotton	297.5	300.0	- 0.8
Sheets & other bedding, total[6]	504.8	510.7	- 1.2
Man-made fibers, total	263.8	254.1	+ 3.8
Rayon & acetate	11.7	12.0	- 2.5
Other man-made fibers	252.1	242.1	+ 4.1
Cotton	241.0	256.6	- 6.1
Miscellaneous household textiles, total[7]	75.9	73.9	+ 2.7
Man-made fibers, total	48.0	45.7	+ 5.0
Rayon & acetate	7.1	8.1	- 12.3
Other man-made fibers	40.9	37.6	+ 8.8
Cotton	27.9	28.2	- 1.1

(Footnotes on next page)

MATERIALS CONSUMED IN PRODUCTION

(Footnotes for Preceding Table)

1. Lace, ruffled, cottage, cafe and tiered types included.
2. Includes furniture slipcovers, vinyl-coated fabrics for upholstery and olefin and saran webbing for outdoor furniture. Also includes the backing and headers of various drapery fabrics. The cotton data includes cotton drapery linings.
3. Includes tailored and throw spreads (tufted and woven), as well as their backing, comforters and their outer shell.
4. Includes woven, knitted, needle-punched and flocked full-sized and crip blankets and electric blanket shells as well as the woven acetate or nylon filament yarn bindings. Sizable poundages of rayon, acrylic, nylon and woll waste are also included.
5. Includes woven hand, bath, dish and other towel types. The large cotton waste poundage used in these products is not included.
6. Sheets includes pillowcases. Other bedding includes the outside cover of quilted pads, mattress pads, mattresses and innersprings, cots and sleeping bags.
7. Includes woven and lace napery, such as tablecloths, napkins and doilies. Also includes man-made fibers used in insect screening and netting as well as cotton used in window shades.

Source: Textile Economics Bureau, Inc.,
Textile Organon, (November 1981).

SHIPMENTS

Shipments of sheets and pillowcases rose 11.5% in value, reaching $1.2 billion in 1981, although the number of units shipped was virtually the same as in 1980, according to the Census Bureau. Flat and fitted sheet shipments were up 12.3% in value on a 1% increase in the quantity shipped. The value of 1981 shipments of finished terry woven towels, $850.4 million, was 5.5% higher than the 1980 shipment value of $806.2 million despite a 3.2% drop in the number of towels shipped by U.S. manufacturers.

Over the first six months of 1982, sheet and pillowcase shipments fell 9.5% in value and 14.5% in units, with the 12.5% drop in the value of pillowcase shipments representing the largest decline. Fitted sheet shipments dropped 12.0% in value and 16.5% in units.

Quantity & Value of Shipments of Sheets, Pillowcases & Towels
By All Producers, 1980, 1981

	Quantity (Thous. Doz.)			Value of Shipments (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Sheets & pillowcases, total	31,070	31,086	- 0.05%	$1,226.0	$1,099.1	+ 11.5%
Crib size sheets	616	678	- 9.1	18.1	18.0	+ 0.6

(continued)

Quantity & Value of Shipments of Sheets, Pillowcases & Towels
By All Producers, 1980, 1981
(continued)

	Quantity (Thous. Doz.)			Value of Shipments (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Other sheets	16,310	16,145	+ 1.0%	$941.2	$838.3	+ 12.3%
By type:						
Flat sheets	9,980	9,740	+ 2.5	575.7	511.0	+ 12.7
Polyester/cotton blends	9,562	9,360	+ 2.2	546.2	486.1	+ 12.4
All other fabrics & blends	418	380	+ 10.0	29.5	24.9	+ 18.5
Fitted sheets	6,330	6,405	- 1.2	365.4	327.4	+ 11.6
Polyester/cotton blends	6,002	6,134	- 2.1	343.4	309.8	+ 10.8
All other fabrics & blends	328	271	+ 21.0	22.1	17.6	+ 25.6
By size:						
King size	1,272	1,206	+ 5.5	121.2	107.5	+ 12.7
Queen size	2,315	2,180	+ 6.2	182.0	155.7	+ 16.9
Full size	6,092	6,334	- 3.8	336.0	312.9	+ 7.4
Twin size	6,213	6,008	+ 3.4	286.6	249.0	+ 15.1
Single size & smaller	418	417	+ 0.2	16.4	13.2	+ 24.2
Pillowcases, total	14,144	14,263	- 0.8	266.7	242.8	+ 9.8
Polyester/cotton blends	13,448	13,644	- 1.4	251.4	229.9	+ 9.3
All other fabrics & blends	696	619	+ 12.4	15.3	12.9	+ 18.6
Finished terry towels, total	43,247	44,694	- 3.2	850.4	806.2	+ 5.5
By type:						
Sheared	16,466	16,201	+ 1.6	356.6	333.7	+ 6.9
Nonsheared	26,781	28,493	- 6.0	493.8	472.5	+ 4.5
By end use:						
Kitchen	5,873	5,514	+ 6.5	42.8	40.0	+ 7.0
Bath size	20,291	20,305	- 0.07	541.8	502.5	+ 7.8
Hand, face, guest & fingertip	15,428	16,810	- 8.2	203.4	199.9	+ 1.7
Bath/tub mats	519	480	+ 8.1	18.2	15.1	+ 20.5
All other towels, including queen/king bath towels, beach towels, etc.	1,136	1,585	- 28.3	44.1	48.7	- 9.4
Terry towels sold for further processing elsewhere (i.e. blanks)	5,820	4,905	+ 18.6	81.8	66.0	+ 23.9
Huck & crash towels, including dish towels	26,710	27,956	- 4.5	18.3	17.5	+ 4.6
Terry washcloths	22,283	22,437	- 0.7	120.8	113.4	+ 6.5

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels,
MQ-23X(81)-5.

Value of Shipments of Sheets, Pillowcases & Towels
Percent by Quarters, 1981

	Year 1981	1st Quarter (Jan.-March)	2nd Quarter (April-June)	3rd Quarter (July-Sept.)	4th Quarter (Sept.-Dec.)
Sheets					
Crib-size	100.0%	21.0%	27.1%	27.1%	24.8%
Flat	100.0	21.4	27.2	23.1	28.3
Fitted	100.0	21.0	27.5	22.4	29.1
Pillowcases	100.0	21.7	27.8	22.0	28.5
Terry woven towels	100.0	22.7	26.6	23.4	27.3
Kitchen	100.0	20.0	27.7	24.3	27.9
Bath size	100.0	22.3	26.7	23.3	27.7
Hand, face, guest & fingertip	100.0	23.9	25.8	23.4	26.8
Bath/tub mats	100.0	24.5	28.9	23.9	22.6

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels.

Percent of the Value of Sheet, Pillowcase & Towel Shipments
Accounted For by Specified Distribution Channels, 1981

		Distribution Channels		
	Total	Branded Retail	Private Ticket Retail	Institutional & Other
Flat & fitted sheets*	100.0%	62.4%	18.1%	19.4%
Pillowcases*	100.0	70.4	17.1	12.5
Terry woven towels	100.0	56.0	14.9	29.1
Bath size	100.0	55.8	15.4	28.8
Hand, face, guest & fingertip	100.0	53.5	12.9	33.6
Terry washcloths	100.0	62.2	16.9	20.9

* Of polyester/cotton blends only.

Definition of terms

Branded Retail - Sales of company brands including premium goods, drops (closeouts) and seconds sold to consumers through all types of retailers.

Private ticket retail - Sales carrying a retail company's label

Institutional & other - Includes Federal & State contract business, commercial accounts (e.g. hotels) sold on a contract basis and dealers involved in resale to the institutional trade.

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels.

SHIPMENTS

Polyester/cotton sheets and pillowcases with fancy finishes (jacquards, mixed colors, pattern weaves, etc.) accounted for more than two thirds of the total shipment value of these goods in 1981. Almost half (49.5%) of the shipment value of terry woven towels was accounted for by solid color towels.

Percent Distribution of the Quantity & Value of Shipments of Sheets, Pillowcases & Towels by Type of Finish, 1981

	Type of Finish					
	White		Solid Colors		Fancies	
	Quantity	Value	Quantity	Value	Quantity	Value
Flat & fitted sheets*	19.7%	17.7%	15.4	15.5	64.9	66.8
Pillowcases*	18.8	13.1	13.9	15.0	67.3	71.9
Terry woven towels	29.7	22.3	42.3	49.5	28.0	28.2
Bath size	26.9	20.1	44.9	50.5	28.1	29.4
Hand, face, guest & fingertip	34.2	26.9	42.4	49.3	23.4	23.7

*Polyester/cotton blends only.

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels.

The latest source of information on shipments of home textiles, other than sheets, pillowcases and towels, is the 1977 Census of Manufactures report, from which the following table was extracted.

Quantity & Value of Shipments of Selected Home Textiles Shipped by All Producers, 1972, 1977

(Quantity in million units unless otherwise noted)

	Quantity			Value (Mil. $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Curtains & draperies, except lace total (in millions of pairs or sets)	na	na	--	$ 936.7	$ 626.2	+ 49.6%
Window curtains:						
Wholly or chiefly cotton	14.9	29.4	- 49.3%	45.6	58.8	- 22.4
Wholly or chiefly man-made:						
Glass fiber fabrics	1.6	5.2	- 69.2	7.7	12.0	- 35.8
Other man-made fabrics	37.4	29.7	+ 25.9	162.8	68.3	+138.4
Other materials, including plastics	2.0	5.8	- 65.5	17.7	12.4	+ 42.7

(continued)

Quantity & Value of Shipments of Selected Home Textiles Shipped by All Producers, 1972, 1977

(Quantity in million units unless otherwise noted)
(continued)

	Quantity			Value (Mil. $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Draperies:						
Wholly or chiefly cotton	12.5	19.4	- 35.6	127.3	127.9	- 0.5%
Wholly or chiefly man-made:						
Glass fiber fabrics	2.9	8.3	- 65.1	20.1	31.9	- 37.0
Other man-made fabrics	26.0	20.7	+ 25.6	265.6	129.5	+105.1
Other materials including plastics	2.4	2.9	- 17.2	26.6	11.1	+139.6
Curtains & draperies, n.s.k.	na	na	--	311.3	174.3	+ 78.6
Bedspreads & bedsets	na	na	--	400.3	312.5	+ 28.1
Tufted:						
Wholly or chiefly cotton tufting yarns	1.8	11.6	- 84.4	11.0	60.5	- 81.8
Other tufting yarns	2.1	4.3	- 51.2	27.5	23.9	+ 15.1
Jacquard woven	na	7.6	--	na	49.9	--
Quilted	na	na	--	169.8	na	--
Other than tufted, jacquard woven or quilted	8.9	12.9	- 31.0	102.0	80.9	+ 26.1
Other, including n.s.k.	na	na	--	47.0	97.3	- 51.7
Shower & bath curtains, including plastics	18.5	22.5	- 17.8	62.7	44.5	+ 40.9
Comforters & wadded quilts	7.8	7.3	+ 6.8	81.6	32.9	+148.0
Quilted products, except comforters & wadded quilts:						
Mattress protectors	20.3	12.2	+ 66.4	76.6	47.9	+ 59.9
Other, including baby pads	na	na	--	18.7	16.1	+ 16.1
Tablecloths:						
Plastics or plastics-coated or laminated	22.8	na	--	46.6	28.7	+ 62.4
All other tablecloths	na	na	--	57.2	34.9	+ 63.9
Napkins	na	na	--	24.5	6.7	+265.7
Place-mats & place-mat sets, including plastics	na	na	--	17.8	11.2	+ 58.9
Other related articles, except lace (dresser covers & scarves, table sets, doilies, tray cloths, etc.)	na	na	--	21.3	19.3	+ 10.4

(continued)

SHIPMENTS

Quantity & Value of Shipments of Selected Home Textiles Shipped by All Producers, 1972, 1977

(Quantity in million units unless otherwise noted)
(continued)

	Quantity			Value (Mil. $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Pillows:						
Bed pillows:						
Foam rubber	na	8.3	--	$ 23.0	$ 19.9	+ 15.6%
Other materials	15.8	23.2	- 31.9%	85.7	50.8	+ 68.7
Fancy pillows & cushions:						
Foam rubber	3.7	6.7	- 44.8	21.5	19.1	+ 12.6
Other materials	na	14.1	--	64.2	42.5	+ 51.1
Slip covers:						
Furniture covers, except paper	11.5	na	--	55.5	52.1	+ 6.5
Mattress	12.1	na	--	18.5	11.7	+116.2
Other slip covers	15.3	na	--	6.8		

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-I-23E.

By Geographic Area

Value of Shipments of Specified Home Textiles By Leading States, 1972, 1977

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Bedspreads & bedsets*, U.S. total	$ 300.4	$ 261.2	+ 15.0%
Leading States:			
Georgia	67.9	62.9	+ 7.9
North Carolina	65.9	67.2	- 1.9
New York	60.3	54.5	+ 10.6
California	21.4	na	--
Leading states, total	215.5	na	
Percent of U.S. total	71.7%	na	

(continued)

SHIPMENTS

By Geographic Area

Value of Shipments of Specified Home Textiles By Leading States, 1972, 1977 (continued)

	Value of Shipments (Mil. $) 1977	1972	% Change 1977/1972
Sheets & pillowcases*, U.S. total	$ 479.5	$ 318.5**	+ 50.5%
Leading States:			
California	3.8		
New York	2.0		
Leading states, total	5.8		
Percent of U.S. total	1.2%		
Towels & washcloths, U.S. total	276.6	112.9	+145.0
Leading States:			
New York	2.8		
Percent of U.S. total	1.0%		
Window shades & accessories, U.S. total	140.3	80.9**	+ 73.4
Leading States:			
New York	11.3		
Indiana	10.9		
New Jersey	3.4		
California	3.2		
Wisconsin	2.5		
Leading states, total	31.3		
Percent of U.S. total	22.3%		
Venetian blinds, U.S. total	89.6	29.1**	+207.9
Leading States:			
California	10.6		
Texas	7.7		
New York	3.8		
Florida	2.1		
Leading states, total	24.2		
Percent of U.S. total	27.0%		
Other shades & blinds, n.e.c. & drapery hardware, U.S. total	329.7	160.4**	+105.5
Leading States:			
California	46.1		
New York	11.9		
Florida	5.4		
Leading states, total	63.4		
Percent of U.S. total	19.2%		

(Footnotes continued on next page)

SHIPMENTS

Footnotes For Preceding Table

* Includes only those products not made in weaving mills.
** Shipments by state unavailable for 1972.
na = not available.
n.e.c. = not elsewhere classified.

Source: Based on U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCER PRICE TRENDS

The rise in the producer (factory) price index of 6 out of 8 home textiles categories exceeded the increase in the index for all commodities (9.1%) between 1980 and 1981. Bath products paced the producer price rise among home textiles with a 15.2% increase. However, there was only a moderate 2.6% gain in the index for bath products between the average for the first 7 months of 1982 and the 1981 annual average.

Producer Price Indexes for Home Textiles, 1979 - 1981 &
January - July 1982
(Dec. 1977 = 100 unless otherwise indicated)

	Jan.-July	Annual Averages			% Change
	1982	1981	1980	1979	1981/1980
All commodities (1967 = 100)	298.8	293.4	268.8	235.6	+ 9.1%
Textile housefurnishings (1967=100)	242.9	226.7	206.9	190.4	+ 9.6
Bed clothes	137.5	129.8	117.3	106.2	+ 10.7
Bedspreads & bedsets (1967=100)	244.1	na	213.8	192.8	--
Flat sheets, except crib size	137.5	130.4	115.5	106.1	+ 12.9
Fitted sheets, except crib size	142.3	133.9	118.2	105.9	+ 13.3
Pillowcases	136.7	na	na	106.8	--
Bath products	146.8	143.1	124.2	110.5	+ 15.2
Towels for home use (1975=100)	na	na	147.4	131.4	--
Shower & bath curtains (1969=100)	208.3	202.6	180.1	157.6	+ 12.5
Window & furniture accessories	135.0	119.3	115.4	111.9	+ 3.4
Draperies (1969=100)	176.0	156.5	153.8	151.2	+ 1.8

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports

Sheet and pillowcase imports represented only 1.0% of the total value of apparent consumption (manufacturers' shipments minus exports plus imports) of these goods in the U.S. in 1981, up slightly from 0.8% in 1980. Imports of terry woven towels accounted for 9.7% of apparent consumption value, a jump from 7.7% in 1980. In

SHIPMENTS

Imports (continued)

addition, 18.2% of the new domestic supply of terry woven towels were imported in 1981 compared with 14.6% in 1980.

According to Census Bureau figures, 1981 imports of sheets and pillowcases made of vegetable fibers increased 48.9% in value to $9.7 million while the quantity imported rose 67.4% to 3.2 million units. Towels made of vegetable fibers gained 38.1% in value and 52.5% in the number imported.

Imports of Specified Home Textiles
By Leading Country of Origin, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Sheets & pillowcases, of vegetable fibers, nspf	3,156.2	1,885.1	+ 67.4%	$ 9,727	$ 6,531	+ 48.9%
Mainland China	1,645.3	889.7	+ 84.9	3,155	2,051	+ 53.8
Canada	247.2	190.3	+ 29.9	1,711	1,068	+ 60.2
England	222.6	218.6	+ 1.8	1,666	1,791	- 7.0
Curtains & draperies, of vegetable fibers, not ornamented, nspf	50.8	54.7	- 7.1	355	228	+ 55.7
England	29.5	19.2	+ 53.6	249	131	+ 90.1
Shop towels, cotton, not ornamented, jacquared-figured or pile or tufted	112,154.4	94,727.6	+ 18.4	9,761	7,804	+ 25.1
Mainland China	92,660.4	48,432.5	+ 91.3	7,728	3,230	+139.3
Towels, of vegetable fibers, not ornamented, nspf	160,008.6	104,890.5	+ 52.5	90,770	65,720	+ 38.1
Pakistan	87,831.4	47,991.6	+ 83.0	29,300	15,729	+ 86.3
Mainland China	25,052.3	10,651.2	+135.2	10,723	6,559	+ 63.5
India	18,468.6	17,866.2	+ 3.4	7,505	7,513	- 0.1
Blankets & travelling rugs, vegetable & man-made fibers, nspf	1,212.6	1,090.4	+ 11.2	8,608	10,394	- 17.2
Federal Republic of Germany	727.2	720.9	+ 0.9	4,597	6,697	- 31.4
Spain	148.3	174.2	- 14.9	1,984	2,371	- 16.3
Bedding, textile material, nspf (quantity in 1,000 pounds)	3,700.2	4,329.2	- 14.5	18,449	19,511	- 5.4
India	1,310.3	1,556.2	- 15.8	4,964	4,859	+ 2.2
Mexico	866.3	934.6	- 7.3	3,145	2,878	+ 9.3

(continued)

FOREIGN TRADE

Imports

Imports of Specified Home Textiles
By Leading Country of Origin, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Tablecloths & napkins, of vegetable fibers, not ornamented, nspf	5,204.0	3,617.9	+ 43.8	$13,587	$ 8,924	+ 52.2%
Mainland China	1,114.8	589.3	+ 89.2	2,714	1,368	+ 98.4
Pakistan	976.1	420.6	+132.1	1,718	702	+144.7
India	730.8	640.8	+ 14.0	1,785	1,390	+ 28.4
Blankets & travelling rugs, wool (quantity in 1,000 pounds)	367.7	347.2	+ 5.9	3,276	2,825	+ 16.0
England	140.7	179.3	- 21.5	1,479	1,509	- 2.0

nspf = not specially provided for.

* The C.I.F. value is the import value at the first port of entry in the U.S. It is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135 December 1980, 1981

Exports

Exports of sheets and pillowcases totaled $112.1 million in 1981, 9.1% of the total value of manufacturers' shipments, according to the Census Bureau. This represents a small decline from the $114.0 million value placed on sheet and pillowcase exports in 1980, when these exports were 10.4% of total shipment value.

In 1981, cotton sheet exports fell 20.8% in value to $40.0 million on a 46.0% drop in the number exported to 8.6 million. Sheets and pillowcases made of textile fibers other than cotton or man-made fibers had an export value of $20.7 million in 1981, 87.3% higher than in 1980.

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Home Textiles By Leading Country of Origin, 1980, 1981

	Quantity (Thous. Units)			Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Sheets, cotton	8,577.7	15,883.2	- 46.0%	$40,039	$50,535	- 20.8%
England	1,869.1	3,262.5	- 42.7	7,921	11,093	- 28.6
Saudi Arabia	831.6	2,052.9	- 59.5	3,164	4,336	- 27.0
Panama	711.7	369.9	+ 92.4	3,361	1,448	+132.1
Sheets, man-made fibers	7,870.4	7,613.0	+ 3.4	38,899	37,134	+ 4.7
Venezuela	3,585.1	3,211.7	+ 11.6	14,896	11,631	+ 28.1
Canada	1,197.5	675.3	+ 77.3	6,135	5,267	+ 16.5
England	948.6	1,154.8	- 17.9	5,155	6,788	- 24.0
Pillowcases, including bolster cases, cotton	2,178.7	3,357.9	- 35.1	7,210	8,635	- 16.5
England	500.6	1,590.7	- 68.5	1,448	3,529	- 59.0
Panama	356.3	55.5	+542.0	1,066	222	+380.2
Libya	249.1	--	--	595	--	--
Pillowcases, including bolster cases, man-made fibers	1,705.1	2,156.2	- 20.9	5,269	6,664	- 20.9
Canada	631.8	460.2	+ 37.3	1,687	1,489	+ 13.3
England	413.8	841.1	- 50.8	1,591	2,478	- 35.8
Venezuela	154.1	43.3	+255.9	306	118	+159.3
Sheets & pillowcases, textile fibers other than cotton or man-made	4,457.5	2,702.7	+ 64.9	20,673	11,037	+ 87.3
Saudi Arabia	954.0	215.3	+343.1	4,436	863	+414.0
Kuwait	633.0	671.1	- 5.7	1,372	1,167	+ 17.6
England	521.3	307.3	+ 69.6	2,051	1,406	+ 45.9
Bedspreads, cotton	754.5	803.7	- 6.1	7,727	5,983	+ 29.1
Mexico	110.9	132.8	- 16.5	791	562	+ 40.7
Canada	109.7	86.1	+ 27.4	892	670	+ 33.1
Dominican Republic	76.4	46.0	+ 66.1	696	468	+ 48.7
Bedspreads, textile fibers except cotton	1,232.4	868.1	+ 42.0	10,991	7,475	+ 47.0
Mexico	389.0	83.5	+365.9	2,201	399	+451.6
Canada	195.2	156.5	+ 24.7	1,339	1,382	- 3.1

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Home Textiles By Leading Country of Origin, 1980, 1981

(continued)

	Quantity (Thous. Units)			Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Coverlets, quilts & comforters, cotton	109.6	115.3	- 4.9%	$1,061	$1,319	- 19.6%
Kuwait	15.3	--	--	115	--	--
Coverlets, quilts & comforters, textile materials except cotton	146.0	139.1	+ 5.0	2,222	1,991	+ 11.6
Canada	38.7	46.0	- 15.9	628	768	- 18.2
Mexico	30.8	16.6	+ 85.5	314	213	+ 47.4
Blankets, cotton	651.6	851.9	- 23.5	3,280	2,914	+ 12.6
Mexico	437.1	590.7	- 26.0	2,048	1,525	+ 34.3
Other blankets, except electric, textile materials except cotton	807.8	738.5	+ 9.4	4,467	3,710	+ 20.4
Mexico	205.1	64.7	+217.0	1,016	293	+246.8
Argentina	157.0	114.7	+ 36.9	576	430	+ 33.9
Other bedding, including mattress & pillow covers, textile material, nspf	1,131.2	602.0	+ 87.9	4,293	1,868	+129.8
Chile	257.9	--	--	941	--	--
Panama	137.2	139.3	- 1.5	229	226	+ 1.3
Curtains & drapes, lace or net textile materials	174.9	138.1	+ 26.6	791	455	+ 73.8
Canada	66.0	60.3	+ 9.4	236	165	+ 43.0
Saudi Arabia	58.7	--	--	276	--	--
Other curtains & drapes, cotton	376.1	296.6	+ 26.8	1,786	1,080	+ 65.4
Mexico	158.2	86.3	+ 83.3	567	217	+161.3
Other curtains & drapes, man-made fibers	357.8	233.6	+ 53.2	2,898	2,452	+ 18.2
Canada	180.0	55.1	+226.7	1,136	464	+144.8
Other curtains & drapes, textile materials except cotton & man-made	1,375.4	2,553.5	- 46.1	7,977	8,842	- 9.8
Canada	993.6	2,086.8	- 52.4	5,009	5,431	- 7.8

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Home Textiles By Leading Country of Origin, 1980, 1981
(continued)

	Quantity (Thous. Units)			Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Towels & washcloths, cotton	10,867.5	15,463.4	- 29.7%	$41,513	$41,780	- 0.6%
Canada	3,064.4	2,175.5	+ 40.8	10,601	7,534	+ 40.7
Saudi Arabia	826.0	730.7	+ 13.0	4,288	1,877	+128.4
Towels & washcloths, textile fibers except cotton	3,106.1	3,634.5	- 14.5	9,813	7,920	+ 23.9
England	450.6	611.3	- 26.3	1,016	454	+123.8
New Zealand	355.4	748.0	- 52.5	1,114	851	+ 30.9
Australia	298.3	297.2	+ 0.4	862	574	+ 50.2
Tablecloths & napkins, cotton	777.0	693.7	+ 12.0	3,166	2,805	+ 12.9
Canada	137.1	137.7	- 0.4	872	971	- 10.2
Australia	107.5	42.3	+154.1	435	149	+191.9
Tablecloths & napkins, textile fibers, except cotton	1,772.2	1,812.4	- 2.2	6,836	5,638	+ 21.2
Canada	916.9	818.3	+ 12.0	2,933	2,397	+ 22.4
England	143.3	91.1	+ 57.3	562	319	+ 76.2

*F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the carrier as well as any other costs beyond the port of exportation.

nspf = not specially provided for.

Source: U.S. Bureau of the Census,
U.S. General Exports, December 1980, 1981.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The number of households increased 4.2% to 82.4 million in 1981 compared with 79.1 million in 1980. Since 1970, households have risen 30.0% in number. One of the sparks of this increase is the 75.0% jump in single-person households, well above the increase for any other category, which constituted 22.9% of all households in 1981.

THE POTENTIAL MARKET

Number of U.S. Households by Household Size, 1970, 1980, 1981

	Number of Households (Mil. Units)			% Change		% of Total Households	
	1981	1980	1970	1981/ 1980	1981/ 1970	1981	1970
Total	82.4	79.1	63.4	+ 4.2%	+ 30.0%	100.0%	100.0%
Household Size:							
1 person	18.9	17.8	10.9	+ 6.2	+ 73.4	22.9	17.2
2 persons	25.8	24.7	18.3	+ 4.4	+ 41.0	31.3	28.9
3 persons	14.6	13.8	10.9	+ 5.8	+ 33.9	17.7	17.1
4 persons	12.8	12.5	10.0	+ 2.4	+ 28.0	15.5	15.8
5 persons	6.1	6.0	6.6	+ 1.7	- 7.6	7.4	10.4
6 or more persons	4.2	4.3	6.7	- 2.3	- 37.3	5.1	10.6

Source: U.S. Bureau of the Census,
Current Population Reports,
Population Characteristics,
Series P-20, Nos. 371, 366.

Apart from replacement sales and purchases made by those who are redecorating existing households, home textiles sales are fueled by the growth of new household formations. One of the determinents of the number of new households is the number of marriages in the U.S. In 1981, there were 2,438,000 marriages, a record number, 1.0% more than the 2,413,000 marriages reported by the Department of Health & Human Services in 1980 and 13.2% higher than in 1975. The annual marriage total has risen each year since 1958, with the exceptions of 1974 and 1975. More importantly, the rate of marriages per 1,000 persons rose to 10.6 in 1981 compared with 10.1 in 1975, indicating that the number of marriages has not risen strictly because of a higher marriage-age population.

Another component of new household formations is the number of housing units under construction. Based on the rate of private housing unit starts in September 1982, the seasonally adjusted annual rate of 1,146,000 starts was 14.4% higher than in last September. This gain was propelled largely by a 73% increase in the annual rate of multi-family housing units started. As the following table shows, while the January to September aggregate number of starts in 1982 was down 13.2%, houses with 3 or 4 units declined only 2.8% and those with 5 or more units were almost even with the same nine month period in 1981.

THE POTENTIAL MARKET

Number & Type of Private Housings Units Started, 1980, 1981 & January-September 1982
(Thousands of Units)

	January-September			Annual Totals		
	1982	1981	% Change 1982/1981	1981	1980	% Change 1981/1980
Private housing units started, total	758.3	873.3	- 13.2%	1,084.2	1,292.2	- 16.1%
Type of unit:						
Single family	474.8	581.3	- 18.3	705.4	852.2	- 17.2
2 units	24.4	31.5	- 22.5	38.2	48.8	- 21.7
3 or 4 units	38.5	39.6	- 2.8	52.9	60.7	- 12.8
5 or more units	220.6	220.8	- 0.1	287.7	330.5	- 12.9

Source: U.S. Bureau of the Census,
Bureau of Industrial Economics.

In the four year period between 1977 and 1981, single family unit starts decreased 34.9%. At the same time, multiple unit starts increased 12.3%. According to the 1980 Census of Housing, 33.0% of all housing in the U.S. was renter-occupied. These apartment dwellers provide another market for home textiles. A study of homeowners and renters, conducted in 1981 by Leo Shapiro and Associates, showed that 54.4% of renters were under 35 years old, 67% had annual incomes less than $20,000 (versus 50% of homeowners) and 25% lived alone.

The number of building permits is a barometer of future construction and, hence, new household formations. In September 1982, the seasonally adjusted annual rate for permits was 1,038,000, up 24.3% from a year ago. As of October, 1982, the outlook for further gains in both housing starts and permits issued began to improve as a result of the decline in loan rates.

Additionally, 45.1% of persons over 4 years old moved between 1975 and 1980, according to the Census Bureau. This also creates opportunities for increased home textile sales, as many of these new households will purchase home textile items to suit their new surroundings.

RETAIL SALES BY PRODUCT

After consultations with major industry sources, HFD Textiles Report issued the following estimates of 1981 sales in specified home textiles categories. The three largest segments of the $10.3 billion industry in 1981 were: bath towels, which contributed 13.4% of total sales, sheets and pillowcases (12.8%), and blinds (10.7%).

RETAIL SALES BY PRODUCT

Retail Sales of Major Home Textiles Categories, 1981

	1981 Sales (Mil. $)
Home textiles sales, total	$ 10,289
Bedding, total*	3,373
Sheets & pillowcases	1,315
Blankets	642
Bedspreads	406
Comforters	593
Bed pillows	225
Mattress pads	192
Window coverings, total*	3,821
Curtains	600
Draperies	977
Shades	404
Blinds	1,105
Woven woods & shutters	165
Hardware	470
Made-to-measure draperies	100
Bath shop, total	2,057
Towels	1,384
Shower curtains	130
Rugs, bath mats, etc.	327
Accessories	216
Decorative home textiles, total	605
Decorative fabrics	420
Decorative pillows	185
Tabletop textiles, total	533
Table linens	320
Kitchen textiles	213

* Excludes sales of these items in the custom-made, shop-at-home market. HFD estimates custom-made curtains and draperies sales in this market at $400 million, and custom-made bedspreads, slipcovers, etc. at $800 million. According to HFD, more than 20,000 retailers are involved to some degree in shop-at-home selling of home textiles.

Source: HFD Textiles Report, May 17, 1982.

RETAIL SALES BY TYPE OF OUTLET

HFD estimated that department stores control 26% of all home textiles sales in 1981, barely ahead of the 25% share of sales done in specialty stores. Discount stores were responsible for 21% of home textiles sales in 1981, according to HFD.

Percent of Dollar Sales of Major Home Textile Categories By Type of Outlet, 1981

	Percent of Sales Done In:			
	Department Stores	Discount Stores	National Stores	All Other Stores*
BEDDING:				
Sheets & pillowcases	35%	29%	26%	10%
Blankets	32	26	27	15
Bedspreads	28	17	32	23
Comforters	30	18	32	20
Bed pillows	26	40	16	18
Mattress pads	25	35	29	11
WINDOW COVERINGS:				
Curtains	28	12	51	9
Draperies	22	13	56	9
Shades	10	15	27	48
Blinds	6	7	11	76
Woven woods & shutters	6	19	29	46
Drapery hardware	5	15	45	35
Made-to-measure draperies	35	5	30	30
BATH SHOP:				
Towels	34	27	24	15
Shower curtains	20	35	20	25
Rugs, bath mats, etc.	31	25	29	15
Accessories	32	10	16	42
DECORATIVE HOME TEXTILES:				
Decorative fabrics	13	5	13	69
Decorative pillows	43	28	24	5
TABLETOP TEXTILES:				
Table linens	45	20	25	10
Kitchen textiles	30	31	29	10

* Predominently independent specialty stores.

Source: HFD Textiles Report,
May 17, 1982

RETAIL SALES BY TYPE OF OUTLET

The latest official information on retail sales of specified home textiles is provided by the Census Bureau in the 1977 Census of Retail Trade. Only stores with payrolls are included in the merchandise line reports from the census but not all store types which sell home textiles were required to break down store sales by merchandise category.

According to the census, department stores sold a reported $1.4 billion worth of window and furniture coverings in 1977. Curtain, drapery and upholstery stores did a reported $512 million of business in these items the same year.

Linens and domestics sales in 1977 totaled $229.0 million from mail order retailers and $226.6 million in department stores.

Reported Sales of Specified Home Textiles by Leading Store Types, 1977
(Includes only stores with payrolls)

	Window & Furniture Coverings*		Linens & Domestics**	
	Number of Stores#	Sales (Mil. $)	Number of Stores#	Sales (Mil. $)
Department stores##	7,950	$1,396.9	8,523	$2,515.9
Drapery, curtain & upholstery stores	4,427	512.4	627	31.9
Furniture stores	6,187	209.2	954	27.5
Miscellaneous home furnishings stores	2,847	120.9	1,647	193.9
Variety stores	10,713	127.3	12,573	226.6

* Includes sales of ready-made, custom-made and curtain & drapery fabrics.

** Includes sales of sheets, blankets, towels, table coverings & closet accessories.

# Represents the number of stores of that type selling these items. Each business location is reported separately as a store unit, including each unit in a multi-unit organization.

## Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in the mail order house data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC77-L.

RETAIL SALES BY TYPE OF OUTLET

Percent of Total Store Sales Accounted For By Home Textile Sales in Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Sales Accounted For By:	
		Window & Furniture Coverings	Linens & Domestics
Department stores**	$ 76,909.4	1.8%	3.3%
Drapery, curtain & upholstery stores	648.4	79.0	4.9
Variety stores	6,948.3	1.8	3.3

** See footnote for the previous table.

Source: Based on U.S. Bureau of the Census, Census of Retail Trade, 1977, Merchandise Line Sales, RC77-L.

Department Stores

Home textiles accounted for a median 6.3% of total 1981 sales in department stores with sales over $1 million, according to the Merchandising and Operating Results report issued by the National Retail Merchants Association. Sales of home textiles were a slight 0.4% higher, typically, than last year compared with a median of 6.7% sales rise for the store as a whole (excluding budget departments).

Table linens and other table coverings showed the largest median sales gain among home textiles categories (6.8%), followed by towels (+3.9%) and sheets and pillowcases (+3.6%). Custom draperies and slipcovers in the typical department store declined 0.5% in sales compared with 1980.

Merchandising & Operating Results of Specified Home Textiles In Department Stores With Sales Over $1 Million, 1981

(Median Results)

	Total Upstairs Store (117)*	Domestics, Draperies & Home Goods (112)*	Custom Draperies & Slipcovers (37)*	Bath Shop (47)*
Net sales, % change from last year	+ 6.7%	+ 0.4%	- 0.5%	+ 0.8%
Sales, % to total store	90.1	6.3	0.5	0.4
Sales, % to total division	--	100.0	9.7	6.8
Gross margin, % of sales (including cash discounts)	42.0	42.7	42.2	47.7
Markdowns, % of sales	13.0	9.6	6.9	7.3
Sales promotion, % of sales	3.2	4.1	3.6	3.6
Number of stock turns (times)	2.7	1.9	4.2	1.8
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 111.8	$ 63.2	$ 72.4	$ 72.0

(continued)

RETAIL SALES BY TYPE OF OUTLET

Department Stores

Merchandising & Operating Results of Specified Home Textiles In Department Stores With Sales Over $1 Million, 1981

(Median Results)
(continued)

	Linens & Domestics (111)*	Sheets & Pillowcases (56)*	Blankets, Comforters & Bed Pillows (56)*	Table Linens & Other Table Coverings (54)*
Net sales, % change from last year	+ 3.3%	+ 3.6%	+ 1.9%	+ 6.8%
Sales, % to total store	3.9	0.8	1.0	0.9
Sales, % to total division	63.6	13.0	15.4	17.8
Gross margin, % of sales (including cash discounts)	42.5	46.3	43.5	42.7
Markdowns, % of sales	8.5	7.9	8.5	8.7
Sales promotion, % of sales	4.3	5.0	5.5	4.1
Number of stock turns (times)	2.1	2.2	2.1	2.2
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 86.5	$ 101.6	$ 103.5	$ 76.5

	Towels (49)*	Window & Furniture Coverings (94)*
Net sales, % change from last year	+ 3.9%	+ 1.0%
Sales, % to total store	0.9	1.0
Sales, % to total division	16.5	17.1
Gross margin, % of sales (including cash discounts)	46.1	43.7
Markdowns, % to sales	7.3	11.2
Sales promotion, % to sales	4.1	4.1
Number of stock turns (times)	2.3	1.5
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 104.0	$ 47.6

* Number in parenthesis represents the number of stores reporting in each category.

Source: National Retail Merchants Association,
Merchandising & Operating Results of 1982.

RETAIL SALES BY TYPE OF OUTLET

Curtain, Drapery & Upholstery Stores

In 1979, there were 4,090 curtain, drapery and upholstery stores with payrolls operating in the U.S. down from 4,130 in 1978 but more than the 3,867 stores in operation during 1977, according to the U.S. Bureau of the Census. Sales of these establishments in 1977 amounted to $611.7 million, the last year for which sales figures are available.

There were also 6,194 curtain, drapery and upholstery stores in operation during 1977 without payrolls. These stores accounted for an additional $105.5 million in sales. In total, the 10,061 curtain, drapery and upholstery stores in operation during 1977 combined for $717.2 million in sales.

Distribution of Curtain, Drapery & Upholstery Stores
By Sales Volume, 1977

	Stores		Sales	
	No.	%	Mil. $	%
Total stores in operation the entire year	10,061	100.0%	$ 717.2	100.0%
Annual sales:				
$1.0 million & over	24	0.2	37.6	5.2
$500,000-999,000	168	1.7	108.8	15.2
$100,000-499,000	1,862	18.5	385.8	53.8
Under $100,000	8,007	79.6	185.0	25.8

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade, 1977,
Establishment & Firm Size, RC77-S-1.

Leading Stores

The 4 leading sellers of home textiles--Sears, J.C. Penney, K mart & Ward--accounted for approximately 32% of the estimated $10.3 billion (at retail) home textiles market in 1981, according to an HFD Textiles Report market analysis.

Home textiles sales in Mervyn's, a California department store chain, contributed 14.5% of total sales of the chain, the highest percentage of any of the leading stores.

RETAIL SALES BY TYPE OF OUTLET

Leading Stores

The Top 25 Stores in Home Textiles Sales, 1981

Rank	Store	Home Textiles Sales (Mil. $)	% of Home Textiles to Total Store Sales
1	Sears, Roebuck & Co.	$ 1,272	6.3%
2	J.C. Penney	1,055	6.7
3	K mart	934	5.7
4	Montgomery Ward	428	7.5
5	Woolworth/Woolco	340	7.4
6	TG & Y	240	12.0
7	Mervyn's	154	14.5
8	Wal-Mart	152	6.2
9	Target	110	5.4
10	Macy's New York	73	8.3
11	Bamberger's	64	8.0
12	Bloomingdale's	63	10.1
13	Belk Stores	56	4.4
14	Fred Meyer	54	5.2
15	The Broadway	53	7.0
16	Fed Mart	48	6.8
17	Bullock's	43	8.3
18	Venture	43	7.0
19	The Bon	42	11.0
20	Dillard's	41	6.8
21	Marshall Field	41	6.8
22	The May Co.,-L.A.	39	6.5
23	Macy's California	39	6.4
24	Ames Dept. Store	38	10.1
25	Burdine's	38	7.6

Source: HFD Textiles Report, May 17, 1982.

CONSUMER PRICE TRENDS

Retail prices for household linens and curtains, drapes and slipcovers rose more slowly than the overall consumer price index in 1981.

CONSUMER PRICE TRENDS

Consumer Price Indexes for Specified Home Textiles, 1979-1981
& January-July 1982
(Dec. 1977=100 unless otherwise indicated)

	January-July	Annual Averages			% Change
	1982	1981	1980	1979	1981/1980
All items (1967=100)	286.2	272.4	246.8	217.4	+ 10.4%
Textile homefurnishings (1967=100)	217.5	203.0	188.7	173.9	+ 7.6
Household linens	133.0	126.2	115.4	105.7	+ 9.4
Curtains, drapes, slipcovers & sewing materials	138.3	130.9	120.0	103.8	+ 9.1

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

The following information on consumer purchases of home textiles has been developed in the National Panel Diary (NPD) Business Index. This index tracks consumer purchases based on the buying patterns of a panel of 6,500 nationally-representative families reporting to NPD.

In 1981, home textiles purchases made by panel members rose 3.7% in dollars and 2.4% in units compared with the previous year. The most recent information available from NPD showed that purchases were up 6.9% in dollars for the 12-month period ended June 1982 versus the similar period ended June 1981, while unit purchases increased only 1.3%. However, the average price of home textiles bought from July 1981 through June 1982 was 5.5% higher than in the previous 12-month period.

Percent Change in Unit & Dollar Purchases of Specified Home Textiles

	% Change: 1981/1980			% Change: July 1981-June 1982/ July 1980-June 1981		
	Units	Dollars	Average Price	Units	Dollars	Average Price
Total, all categories	+ 2.4%	+ 3.7%	+ 1.3%	+ 1.3%	+ 6.9%	+ 5.5%
Sheets & pillowcases	--	+ 9.6	+ 9.6	- 0.9	+10.2	+11.3
All bathroom towels	+ 8.2	+ 6.5	- 1.2	+ 5.8	+13.7	+ 7.5
Bath towels	+ 6.8	+ 8.8	+ 1.9	+ 7.5	+15.5	+ 7.4
Blankets	-18.7	-13.7	+ 6.1	-14.3	- 6.2	+ 9.5
Bedspread	- 4.9	+ 1.4	+ 6.6	- 6.1	- 2.2	+ 4.1
Comforters	- 7.7	-14.2	- 7.0	+ 4.6	+ 6.4	+ 1.7
Pillows	- 2.6	+ 7.0	+ 9.9	- 1.8	+ 1.6	+ 3.4

Source: Home Fashions Textiles
April 1982, October 1982

CONSUMER BUYING HABITS

A survey which appeared in the June 1982 issue of Home Fashions Textiles of 50 department and discount stores, with a total of 1,500 outlets around the U.S., found that separate bath shops are becoming the norm in both store types. All the surveyed mass merchants who added bath shops in the two years prior to the survey said sales increased, by an average of 27% for the group.

Solid color bath towels were the overwhelming choice as the bestselling towel category in discount stores, as it was in more than half of the department stores surveyed.

Best Selling Towel Categories
(Percent of Respondents)

	Department Stores	Discount Stores
Solid bath towels	58%	81%
Piped towels	25	9
Bath sheets	8	5
Print-jacquard bath towels	3	5
Embellished towels	3	--
Fingertips	3	--

From a demographically representative Consumer Panel of Better Homes & Gardens magazine subscribers, the publication extracted information from 442 women (out of 500 women on the panel) about their sheet purchases. Over half of the women (57.9%) reported that the color of the sheet is the first thing that attracts them, while an additional 38.2% said the pattern of the sheet is the prime attraction. Prior to their sheet purchase, nearly 9 out of 10 women surveyed felt it is helpful to know the type of fabric the sheet is made of.

"Which of the following do you find helpful to know when purchasing sheets?"

	% of Respondents*
Fabric type	88.7%
Fiber content	52.9
Thread count	43.4
None of these	2.3
No answer	1.8

* Percentages do not add to 100% due to multiple responses.

Sheets are most often coordinated with the color of their bedcovering (comforter or bedspread), according to 43.2% of the BH&G survey respondents.

CONSUMER BUYING HABITS

"What is the item you color coordinate your sheets to most often?"

	% of Respondents*
Bedcovering (comforter or bedspread)	43.2%
Wall color	29.9
Floor covering	14.0
Furniture or upholstery color	3.4
No answer	0.7

* Percentages do not add to 100% due to multiple responses.

In another questionnaire mailed to the BH&G Consumer Panel members in August 1980, 34.6% of the 445 respondents indicated they had purchased drapery hardware and/or traverse rods in the 12 months before the survey took place.

"Which of the following have you purchased in the past 12 months?"

	% of Respondents*
Drapery hardware and/or traverse rods	34.6%
Woven wood shade	8.1
Horizontal mini-blinds	5.4
Have not purchased any of the above	56.0
No answer	2.2

* Percentages do not add to 100% due to multiple responses.

More than two-thirds of the respondents (68.7%) believe that standard traverse draperies provide a good-to-excellent degree of energy savings.

"For each window treatment listed below, indicate the degree of energy savings you believe it provides"

	Degree of Energy Savings				
	Excellent	Good	Fair	Poor	No Answer
Standard traverse draperies	22.2%	46.8%	25.4%	2.7%	2.9%
Vertical blinds	3.8	35.5	43.6	10.1	7.0
Horizontal mini-blinds	4.9	30.3	41.3	14.4	9.1
Woven wood shades	9.0	38.9	35.7	8.3	8.1
Conventional shades	6.3	34.4	39.3	13.9	6.1

A recent Home Fashions Textile survey (HFT September 1982) taken among 44 department and discount stores nationwide, representing 3,000 outlets, asked about their current merchandising trends in the decorative and accessory pillow market for the first six months of 1982. According to the HFD Textiles Report, 43% of the business is done in department stores and 28% in discount stores.

CONSUMER BUYING HABITS

The following table shows the breakdown of decorative and accessory pillow purchases in the surveyed stores during the January to June 1982 period.

Percent of Purchases of Decorative & Accessory Pillows by Category
(Percent of Units Sold)

	Department Stores	Discount Stores
Total decorative & accessory pillow purchases	100.0%	100.0%
Decorative pillows	72.0	48.5
Bed rests	10.0	12.5
Floor pillows	7.0	8.0
Chair pads	6.0	24.0
Rocker pads	5.0	7.0

Forty percent of the discount store respondents regard corduroy as the favored fabric for decorative pillows purchased at their stores, compared with 16% of department store respondents. A majority of them (60%) named chintz as the leading fabrication.

Top Decorative & Accessory Pillow Fabrication
(Percent of Respondents)

	Department Stores	Discount Stores
Total respondents	100%	100%
Chintz	60	20
Corduroy	16	40
Velvet	8	15
Eyelet	4	10
Haitian cotton	4	5
Velveteen	4	5
Cotton duck	4	0
Satin	0	5

In another Home Fashions Textiles survey, on bedspreads (HFT September 1981), 48 department and discount store retailers across the country were asked about the bedroom ensembles they carried in the fall 1981 season as well as their thoughts on the fall 1982 season.

Almost eight out of 10 department store respondents, but only two out of 10 discount store respondents, plan to trade up in the price and quality of bedroom ensembles they will offer in the 1982 fall season.

Asked about their best-selling styles, 92% of all respondents said throws were more popular than fitted bedspreads while 81% agreed that quilted styles sell better than unquilted styles.

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in December, 1982): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (1981 Edition available now -- 1982 Edition will be available in December 1982): Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS') (January, 1983): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Department Store Sales
1982

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TABLE OF CONTENTS

Page

INTRODUCTION 1

SUMMARY OF AVAILABLE SALES FIGURES FOR DEPARTMENT STORES, 1981 (BY REGION) 2

DEPARTMENT STORE VOLUME LEADERS
  STORES WITH SALES OF $100 MILLION & OVER 34
  STORES WITH SALES OF $50-TO-$99 MILLION 38

SALES FIGURES FOR MAJOR NATIONAL/REGIONAL CHAINS 40

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS 43

SCHEDULE OF ADDITIONAL FACT FILES 48

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E. B. Gold, Manager
Fairchild Book Division

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INTRODUCTION

This report summarizes the sales and number of stores operated in the year 1981 for traditional department store organizations (as well as a limited number of specialty stores), listed by buying headquarter location. Branch store locations are included where sales estimates are available.

Stores are listed by state and city within the four major geographic regions: Northeast, North Central, South and West. Listings of stores, store groups or divisions with a volume of $50 million or more and of chain and conglomerate organizations are also included in this report.

The sales figures are reported by the stores or are estimates believed to be reasonably accurate. Sources include the editorial staffs of Women's Wear Daily and other Fairchild trade papers, Dun and Bradstreet and other trade sources.

The Standard Industrial Classification (SIC) Manual defines department stores as establishments normally employing 25 people or more, having sales of apparel and soft goods combined amounting to 20 percent or more of total sales, and selling each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radio and TV sets
2. A general line of apparel for the family
3. Household linens and dry goods

To qualify as a department store, sales of each of the above listed lines must be less than 80 percent of total sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceeds the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Relatively few stores are included in this classification as a result of this special rule and most of those which are would otherwise have been classified in the apparel group.

To an increasing extent, however, department stores are diversifying their activities, or becoming part of conglomerate operations active in a number of different types of businesses. This has, of course, added to the difficulty of isolating department store volume from consolidated sales data.

NOTE: This report includes only those stores for which sales data, believed to be reasonably accurate, are available. The sales estimates reported may differ markedly from estimates reported for previous years. This may be due, however, not to an actual gain or loss in volume of the magnitude indicated but to differences in the compilation of estimates. Since revisions in earlier estimates may be in order, year-to-year comparisons in sales figures are not recommended.

Fairchild Market Research Division
Audrey S. Balchen, Director

SUMMARY OF AVAILABLE SALES FIGURES FOR DEPARTMENT STORES, 1981 * BY REGION

NORTHEAST	Approx. Sales (Millions of $)
CONNECTICUT	
Bridgeport	
D. M. Read Inc. (Allied Stores, New York, N.Y.) (5 Conn. stores)	$ 75.0
Hartford	
G. Fox & Co. (May Dept. Stores, St. Louis, Mo.) (8 stores: Conn. 6, Mass. 1, R.I. 1)	170.0
Sage-Allen & Co. (13 stores in Conn.)	53.0
Norwalk	
Caldor (Acquired by Associated Dry Goods, New York, N.Y. in May 1981) (65 stores) (Will take over 5 Stewart & Co. Baltimore stores in 1983)	778.0
MAINE	
Brunswick	
W. F. Senter Co. (1 store)	2.7
Freeport	
L. L. Bean (Mail order business plus 1 store with sales estimated at over $20 million)	121.0
Portland	
Porteous Mitchell & Braun (4 stores plus Downeast Shops specialty store division)	25.0
MASSACHUSETTS	
Boston Area	
Filene's (Federated Dept. Stores, Cincinnati, Ohio) (12 department stores: Mass. 10, N.H. 1, R.I. 1; 5 Basement Stores: Mass. 4, N.H. 1.)	321.6
(4 Basement stores were opened in the New York Metropolitan Area in 1982, as well as 1 in Methuen, Mass.)	
Harvard Coop., Cambridge (6 stores, including 5 on major campuses in Boston and Cambridge, 1 in downtown Boston)	40.0+
Jordan Marsh (Allied Stores, New York, N.Y.) (14 stores: Mass. 11, Me. 1, N.H. 1, R.I. 1)	416.0
(Fox Hill Run store opened in Spring 1982; Crystal Mall, Waterford, Conn. store to open July 1984.)	
The Talbot's, Hingham, Mass. (Catalog headquarters; also 16 stores)	75.0+
Pittsfield	
England Bros. (3 stores in Mass.)	10.0

* A limited number of apparel specialty stores for which sales figures are available are included in this report. Reported sales are for the year 1981, or closest fiscal period, reflecting published figures or best available trade estimates.

DEPARTMENT STORE SALES	Approx. Sales (Millions of $)
NORTHEAST	
MASSACHUSETTS	
Springfield	
Albert Steiger Inc. (9 stores in Mass.)	$ 50.0
Waltham	
Grover Cronin Inc. (1 store)	11.0
NEW JERSEY	
Burlington	
Burlington Coat Co. (2 specialty stores)	30.0
Newark	
Bamberger's (R.H. Macy & Co., New York, N.Y.) (23 stores: N.J. 14, Pa. 5, N.Y. 1, Del. 1, Md. 2; also 3 Furniture Clearance Centers, 7 Auto Centers)	800.0
Hahne & Co. (Associated Dry Goods, New York, N.Y.) (8 N.J. stores)	100.0
Ocean City	
Howard S. Stainton Co. (1 store)	7.0
Paramus	
Stern Bros. (Allied Stores, New York, N.Y.) (7 N.J. stores) (Merchandising operations merged with Gertz's in Aug. 1982)	124.0
Paterson	
Meyer Brothers (2 N.J. stores)	4.0+
NEW YORK	
Binghamton	
Fowler, Dick & Walker (L.S. Good & Co., Wheeling, W.Va.) (2 N.Y. stores)	10.0
Buffalo	
Adam, Meldrum & Anderson (9 N.Y. stores) (A branch in former Hens & Kelly Bldg., Northtown Plaza, Buffalo, was opened in August 1982)	80.0
William Hengerer (Associated Dry Goods, New York, N.Y.) (5 stores merged with Sibley, Lindsay & Curr Div. in August 1981. Name changed to Sibley's)	30.0
Hens & Kelly (Twin Fair, Inc.) (8 N.Y. stores) (4 stores closed in 1981, including downtown Buffalo, Northtown Plaza, Transition Plaza and Aurora Village Shopping Center)	20.0
The Sample Inc. (12 N.Y. stores)	21.0
Elmira	
S.F. Iszard & Co. (2 N.Y. stores)	8.0
Endicott	
Burt Co. (2 N.Y. stores)	4.0

DEPARTMENT STORE SALES

NORTHEAST

	Approx. Sales (Millions of $)
NEW YORK	
Glens Falls	
Economy Dry Goods (2 N.Y. stores)	$ 19.0
Jamestown	
Abrahamson & Bigelow (1 department store, 2 specialty stores)	3.5
Liberty	
Sullivan's (2 N.Y. stores)	16.0
New York City Area (Also see NEW JERSEY listings)	
Abraham & Straus (Federated Dept. Stores, Cincinnati, Ohio) (14 stores: N.Y. 9, N.J. 4, Pa. 1)	605.0
Fulton St., Brooklyn (store to be reduced in size)	128.0
Hempstead	40.0
Huntington	54.0
King of Prussia, Pa. (opened Aug. 1981) Expected annual rate:	22.0
Manhasset	59.0
Monmouth Mall, Eatontown, N.J.	63.0
Paramus Park, N.J.	32.0
Short Hills, N.J. (opened March 1981) Expected annual rate:	22.0
Woodbridge, N.J.	43.0
(Store in Willow Grove, Pa. opened Oct. 1982)	
Alexander's (Alexander's Dept. Store Inc., New York, N.Y.) (16 stores: Conn. 1, N.J. 3, N.Y. 12)	523.6
(Sold specialty store div., Margo's La Mode July 1981 to Elder Beerman)	
B. Altman & Co. (The Altman Foundation, New York, N.Y.) (6 stores: N.Y. 3, N.J. 2, Pa. 1)	295.0
Fifth Avenue	145.0
Manhasset	30.0
Paramus, N.J.	39.0
St. Davids, Pa.	17.0
Short Hills, N.J.	26.0
White Plains	37.0
(Willow Grove Park, Pa. store opened Aug. 1982. Expected annual rate: $20 million)	
Ann Taylor (Allied Stores, New York, N.Y.) (38 stores)	35 to 40
Barney's (1 specialty store)	50.0
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, Calif.) (1 store)	73.0
Bloomingdale's (Federated Dept. Stores, Cincinnati, Ohio) (11 full-line department stores: N.Y. 4, N.J. 2, Va. 1, Md. 1, Pa. 1, Conn. 1, Mass. 1; 5 homefurnishings stores: N.Y. 3, Pa. 1, Mass. 1)	647.4
New York Area stores	485.5
59th Street (to be enlarged)	259.0
Fresh Meadows	20.0
Garden City	37.0
Manhasset (homefurnishings store, converted in 1982 to a Filene's Basement Store)	10.0
Scarsdale (homefurnishings store, to be closed)	2.5

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST

NEW YORK

New York City Area (continued)

	Approx. Sales (Millions of $)
Bloomingdale's (continued)	
New Rochelle (homefurnishings store)	$ 1.0
White Plains	40.0
Riverside Sq., Hackensack, N.J. (Bergen County)	49.0
Short Hills, N.J.	35.0
Stamford, Conn.	31.0
Outside of New York Area	163.0
Jenkintown, Pa. (closed July 1982)	11.0
King of Prussia, Pa. (opened August 1981)	18.0
White Flint Mall, Md. and Tyson's Corner, Va.	60 to 65
(Bloomingdale's opened a store in Willow Grove Park, Philadelphia in August 1982 which is expected to have a 1st year annual volume of $30 million. A Dade County, Fla. store is to be opened in Spring 1984; Valley View Mall, Dallas store in Oct. 1983.)	
Bonwit Teller (Allied Stores, New York, N.Y.) (13 stores: Mass. 1, N.Y. 3, N.J. 1, Pa. 2, Ill. 2, Mich. 1, Fla. 2, Calif. 1)	90.0
New York Area	
Fifth Avenue (opened April 1981)	16.0
Manhasset	10.0
Scarsdale	7.5
Short Hills, N.J.	6.5
Outside of New York Area	40.0
(A Palm Desert, Palm Springs, Calif. store is to be opened in 1983)	
Brooks Bros. (Allied Stores, New York, N.Y.) (28 stores incl. 5 in Japan)	165.0
Gimbels-New York (Batus Inc., New York, N.Y.) (10 stores: N.Y. 7, Conn. 2, N.J. 1)	270.0
Herald Square	100.0
86th Street	46.0
Lord & Taylor (Associated Dry Goods, New York, N.Y.) (37 stores: N.Y. 5, Conn. 2, Mass. 3, Md. 1, N.J. 2, Pa. 2, Va. 3, D.C. 1, Fla. 1, Ga. 1, Ill. 7, Mich. 3, Tex. 6)	528.0
New York Area (8 stores plus Clearance Center)	181.0
Fifth Avenue	78.0
Garden City	14.0
Westchester	20.0
Huntington Clearance Center	2.0
Manhasset	12.0
Milburn, N.J.	12.0
Paramus Park, N.J.	14.0
West Hartford, Conn.	11.0
Stamford, Conn.	18.0
Available sales estimates for branch stores in other areas:	
South:	
Washington, D.C. Area (4 stores)	75.0
Fair Oaks, Va. opened Feb. 1981. Expected annual vol:	10.0

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST

NEW YORK

New York City Area (continued)	Approx. Sales (Millions of $)
Lord & Taylor (continued)	
Dallas, Tex. Area	$ 27.0
NorthPark	15.0
Prestonwood Town Center	10.0
Collin Creek Mall, Plano (opened Oct. 1981)	2.0
Houston, Tex. Area	39.0
Galleria	20.0
Greenspoint Mall	8.0
Memorial City	11.0
(Lord & Taylor opened its 2nd Fla. store, in Cutler Ridge Mall, Miami, Jan. 1982. Expected annual rate the 1st year: $10 million. Plans for 1983 openings include: Aventura Mall, Miami--Feb.; West Hartford, Conn.--April; Galleria, Ft. Lauderdale--Oct.)	
Macy's New York (R.H. Macy, New York, N.Y.) (15 stores: N.Y. 14, Conn. 1, plus 4 Furniture Clearance Centers and 8 Auto Centers)	875.0
Herald Square	280.0+
(A Stamford, Conn. store was opened Feb. 1982. In Fall 1983 a store in Aventura Mall, Dade County, Fla. will open; in 1984 2 stores in Houston)	
Mays (J.W. Mays Inc., Brooklyn, N.Y. (11 stores of which 5 were closed in 1982)	189.0
Saks Fifth Avenue (Batus Inc., New York, N.Y.) (32 stores: N.Y. 4, N.J. 1, Pa. 2, Md. 1, N.H. 1, Mass. 1, Mich. 2, Ohio 1, Ill. 3, Ga. 1, Fla. 3, Tex. 1, Ariz. 1, Calif. 8, Mo. 1, Nev. 1)	712.9
Fifth Avenue Store	180.0
Other Eastern Stores, including Boston, Mass.; Springfield, N.H.; White Plains, N.Y.; Garden City, N.Y.; Hackensack (Bergen County), N.J.; Chevy Chase, Md.; Bala Cynwyd, Pa.)	140.0
North Central:	
Plaza Frontenac, St. Louis, Mo.	20.0
Chicago: Michigan Avenue	26.0
Old Orchard	14.0
(Country Club Plaza, Kansas City, Mo., opened Aug. 1982. Expected volume 1st year: $13 million)	
West:	
Los Angeles Area (5 stores)	72.0
San Francisco Area (3 stores incl. Union Sq. opened Aug. 1982)	35.0+
Las Vegas	8.0
South:	
Houston	26.5
Stern's, Bergen Mall, Paramus, N.J. (Allied Stores, New York, N.Y.) (7 N.J. stores. Merchandising operations of Gertz, Inc., Plainview, N.Y. combined with Stern's in 1982)	124.0
Patchogue	
Swezey & Newins (2 stores)	14.0
Plainview	
B. Gertz Inc. (Allied Stores, New York, N.Y.) (9 stores. Merchandising operations merged with Stern's in 1982)	90.0

DEPARTMENT STORE SALES

NORTHEAST

	Approx. Sales (Millions of $)
NEW YORK	
Rochester	
McCurdy & Co. (6 stores)	$ 80.0
Sibley's (Associated Dry Goods, New York, N.Y.) (14 stores including 5 former William Hengerer, Buffalo, stores which were merged with Sibley's in August 1981) (A store in Marketplace Mall, Rochester, opened Oct. 1982)	155.0
B. Forman & Co. (5 stores)	20.0+
Schenectady	
The Carl Co. (5 stores) (Negotiating with United Dept. Stores to buy 2 Denby stores--Troy and Albany)	9.0
Seaford	
Mid-Island Dept. Stores (6 L.I., New York stores)	24.0
Syracuse	
The Addis Co. (4 stores)	9.0
Chappell's Dept. Store, (Northern Light Shopping Center) (6 stores)	19.0
Dey Brothers (Allied Stores, New York, N.Y.) (4 stores)	38.0
White Plains	
Howland Steinbach (28 stores) (Not including Hochschild Kohn)	145.0
PENNSYLVANIA	
Allentown	
Hess's (Crown American Corp.) (24 stores: Pa. 20, Md. 1, N.Y. 3) (Chambersburg, Pa. store opened in Feb. 1982. Hess's acquired Penn Traffic Co.'s 6 dept. stores and 2 women's specialty stores in Western Pa. in Feb. 1982, adding $30 million in sales volume)	211.0
H. Leh & Co. (3 stores)	15.0
Aston	
The Dry Goods (SCOA Industries, Columbus, Ohio) (4 stores: Del. 3, N.J. 1)	60.0
Greensburg	
Troutman's (Allied Stores, New York, N.Y.) (8 Pa. stores)	42.0
Harrisburg	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (6 Pa. stores)	55.0
Hazelton	
P. Deisroth's Sons (2 Pa. stores)	5.0
Johnstown	
Glosser Bros. (1 store plus Gee Bee Discount Stores)	150.0
Penn Traffic Co. (6 department stores, 2 specialty stores. Purchased by Hess's, Allentown, Feb. 1982)	29.5

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
PENNSYLVANIA	
Lancaster	
Watt & Shand (2 Pa. stores)	$ 25.0
Levittown	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (8 stores: Pa. 6, N.J. 1, Del. 1)	70.0+
Philadelphia Area	
Altman's, St. Davids (B. Altman, New York, N.Y.)	17.0
(Willow Grove Park store opened Aug. 1982. Expected 1st year volume: $20 million)	
Bloomingdale's (Bloomingdale's, New York, N.Y.)	
Jenkintown (closed July 1982)	11.0
King of Prussia (opened Aug. 1981)	18.0
(Willow Grove Park store opened Aug. 1982. Expected 1st year volume: $30 million)	
Gimbels-Philadelphia (Batus Inc., New York, N.Y.) (10 stores: Pa. 8, N.J. 2)	170.0
Strawbridge & Clothier (11 department stores plus Clover Stores)	425.6
Department stores (11 stores: Pa. 8; N.J. 2; Del. 1)	275.0
John Wanamaker (Carter Hawley Hale, Los Angeles, Calif.) 16 stores: Pa. 11, N.J. 2, N.Y. 2, Del. 1).	335.0
Downtown Philadelphia	73.0
(A Harrisburg, Pa. store was opened in July 1982)	
(The Willow Grove Park Mall was opened in August 1982. It includes a B. Altman and a Bloomingdale's store. Combined 1st year volume of these 2 stores estimated at $50 million. Abraham & Straus opened in the Mall in Oct. 1982--A & S's second Philadelphia area store)	
Pittsburgh	
Gimbels-Pittsburgh (Batus Inc., New York, N.Y.) (7 Pa. stores)	150.0+
Joseph Horne Co. (Associated Dry Goods, New York, N.Y.) (13 stores: Pa. 11, Ohio 2, plus 2 Boston Stores in Pa.)	160.0
Kaufmann's Department Stores (May Dept. Stores Co., St. Louis, Mo.) (10 stores: Pa. 7, Ohio 2, Ill. 1)	287.0
Reading	
Boscov's Dept. Stores (8 Pa. stores)	150.0
Scranton	
Cleland-Simpson Co. (John Wanamaker, Philadelphia, Pa.) (1 store)	20.0
Oppenheim's Scranton Dry Goods (1 store)	20.0
Uniontown	
Metzler's Dept. Store (2 Pa. stores)	4.0
York	
S. Grumbacher & Sons (14 stores under various names)	50.0
NORTH CENTRAL	
ILLINOIS	
Bloomington	
Rolands of Bloomington Inc. (3 stores in Ill.)	5.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
ILLINOIS	
Champaign	
Robeson's Inc. (1 store)	$ 7.0
Chicago Area	
Carson Pirie Scott & Co. (24 stores in Department Store Division operating in Ill. and Ind.)	311.1
(25th store opened in Oct. 1982 at River Oaks, Calumet City, Ill.)	
Crawford Department Stores (4 stores in Ill.)	11.0
Evans Inc. (specialty stores and leased depts. in Ill., Ind., S.C., D.C., Va., Md.)	80.0
Madigan Bros., River Forest (8 specialty stores)	30.0
Marshall Field (Marshall Field & Co., acquired by Batus Inc. in 1982) (19 stores: Ill. 17, Wis. 1, Tex. 1)	610.0
Chicago Div.	
Houston	24.0
(Galleria, Dallas, Tex. store opened in Oct. 1982. Expected volume 1st year: $12-$15 million)	
Montgomery Ward-Chicago area stores	280.0+
State Street (To be closed at end of 1983)	30.0
Neiman Marcus (Neiman Marcus, Dallas, Texas) (2 stores)	30.0
J.C. Penney (30 area stores)	400.0
The People's Store of Roseland (2 stores)	12.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (2 stores)	30.0
Sears Roebuck Chicago area stores	800.0
State Street (To be closed in 1983)	30.0
Spurgeon Mercantile Corp. (78 stores in Ill., Ind., Ia., Mich., Minn., Wis.)	50.0+
Wieboldt Stores Inc. (15 Chicago area stores)	177.9
Elgin	
Ackemann Bros. (Ill. stores)	6.0
Joseph C. Spiess Co. (3 Ill. stores)	16.0
Granite City	
The Glik Co. (13 Ill. stores)	5.5
Peoria	
P.A. Bergner & Co., Peoria, Ill. (Also operates Myers Bros., Springfield, Ill.)	185.0
(The 16-store Bergner Division was merged with 10-store Bergner-Weise Div., Peoria, in Feb. 1982)	
Szold's, Inc. (2 stores incl. Walton's, Fairbury, Ill.)	12.0
Rock Island	
McCabe's (1 store)	5.0
Rockford	
Bergner Weise Co. (P.A. Bergner Co., Peoria) (10 stores: Ill. 7, Wis. 3)	60.0

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
ILLINOIS	
Springfield	
Stix, Baer & Fuller (Stix, Baer & Fuller, St. Louis, Mo.) White Oaks Mall store (To be taken over by Kohl's Dept. Stores, Milwaukee)	$ 4.0
INDIANA	
Elkhart	
Ziesel Dept. Stores (2 Ind. stores)	5.0
Evansville	
The Evansville Store, Lawndale Shopping Center (Interstate Stores, Latham, N.Y.) (1 store)	6.5
Hammond	
Edward C. Minas Co. (3 Ind. stores)	8.0
Indianapolis	
L. S. Ayres & Co. (Associated Dry Goods Corp., New York, N.Y.) (12 stores)	186.0
William H. Block Co. (Allied Stores, N.Y.) (9 Indiana stores)	88.0
Sycamore Specialty Stores (Associated Dry Goods Corp., New York, N.Y.) (50 stores)	13.0
Muncie	
Ball Stores (3 stores in Ind. Also operates Ball Stores Collegienne Shops)	12.0
IOWA	
Cedar Rapids	
Armstrong Inc. (1 store)	23.0
Killian Co. (3 Iowa stores)	13.0
Davenport	
Petersen-Harned-Von Maur Inc. (7 stores: Ia. 5, Ill. 2)	25.0
Des Moines	
Younker's Dept. Store (Equitable of Iowa Companies, Des Moines, Ia.) (29 stores)	165.0
MICHIGAN	
Detroit Area	
Crowley, Milner & Co. (10 stores)	73.2
Hudson's (Dayton Hudson Corp., Minneapolis, Minn.) (19 stores: Mich. 16, Ohio 1, Ind. 2)	658.1
Downtown Detroit (to be closed at end of 1982)	40.0
(Fort Wayne store opened July 1981; Lansing, Mich. store opened in 1982; Battle Creek, Mich. store to be opened in 1983)	
Winkelman Stores Inc. (88 stores: Mich. 58, Ohio 20, Ill. 10)	99.8

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
MICHIGAN	
Grand Rapids	
Herp's Co. (Allied Stores, New York, N.Y.) (2 stores)	$ 15.0
Paul Steketee & Sons Co. (6 Mich. stores)	25.0
Jackson	
Jacobson Stores (16 dept. stores: Fla. 4, Mich. 11, Ohio 1. Also 7 hfgs. stores, 1 children's wear store)	169.3
Kalamazoo	
Gilmore Bros. (3 Mich. stores)	12.0
Lansing	
J. W. Knapp (L.S. Good & Co., Wheeling, W.Va.) (8 Mich. stores)	30.0+
Saginaw	
W. C. Wiechmann Co. (2 Mich. stores)	7.5
Traverse City	
J. W. Milliken (3 Mich. stores)	5.0
MINNESOTA	
Duluth	
Duluth Glass Block Stores (Mercantile Stores, New York, N.Y.) (2 stores in Duluth; also O. J. De Lendrecie Co., 1 store in Fargo, N.D.)	23.0
Wahl's Dept. store (1 store)	4.0
Mankato	
Bretts Dept. Store (4 stores)	10.0
Minneapolis	
Dayton's (Dayton Hudson, Minneapolis, Minn.) (13 stores: Minn. 9, N.D. 2, S.D. 1, Wis. 1)	410.1
Donaldson's (Allied Stores, New York, N.Y.) (9 stores: Ia. 2, Minn. 7)	107.0
Powers Dry Goods (Associated Dry Goods, New York, N.Y.) (7 Minn. stores)	43.0
Salkin & Linoff (100+ specialty stores)	70.0
St. Cloud	
Fandel (2 dept. stores in Minn. and 2 Intrigue Specialty Stores)	5.0+
G.R. Herberger's Inc. (21 stores: Minn. 7, Mont. 3, N.D. 3 S.D. 5, Wis. 2, Wyo. 1)	45.0+
MISSOURI	
Joplin	
Newman's (5 stores: Mo. 3, Okla. 1, Kans. 1)	18.0

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
MISSOURI	
Kansas City	
Hall's Dept. Store (Hallmark Cards, Kansas City, Mo.) (2 Mo. stores)	$ 21.0
Harzfeld's (Allied Stores, New York, N.Y.) (8 stores: Kans. 2, Mo. 4, Okla. 2)	30.0
The Plaza, Kansas City	10.0
The Jones Co. (Mercantile Stores, New York, N.Y.) (7 Mo. stores)	125.0
Macy's Midwest (R. H. Macy, New York, N.Y.) (21 stores: Kans. 5, Mo. 8, Ohio 8 former LaSalle stores)	186.0
The Plaza, Kansas City	10.0
Stix, Baer & Fuller (Stix, Baer & Fuller, St. Louis, Mo.) (3 stores)	27.0
Independence	5.5
Oak Park	8.0
Ward Parkway	13.5
Swanson's (Hallmark Cards, Kansas City, Mo.) (1 store)	9.5
Woolf Bros. (8 stores: Mo. 4, Kans. 1, Tex. 2, Tenn. 1)	33.0
The Plaza, Kansas City	7.0
(Saks Fifth Ave. opened a store in Aug. 1982 in Country Club Plaza. Expected volume 1st full year: $13 mil.)	
St. Louis	
Famous Barr (May Department Stores, St. Louis, Mo.) (14 stores incl. 11 department stores, 1 specialty store in metro St. Louis, 1 department store in Springfield, Ill. and 1 in Cape Girardeau, Mo.)	328.0
Metropolitan St. Louis (12 stores)	304.0
Downtown	53.0+
Alton Square	13.5
Cape Girardeau, Mo. (opened in Mar. 1981)	9.5
Clayton	27.5
Crestwood	15.0
Northland	26.0+
Northwest Plaza	36.0
St. Clair Square	34.0
St. Peters (opened Aug. 1981)	7.0
South County	27.0+
Southtown	22.0
Springfield, Ill.	14.5
(Battle Field Mall, Springfield store opened in 1982)	
FB, Ltd. (specialty store)	6.0-
Grandpa Pidgeon's (5 stores)	50.0+
K mart (22 stores)	160 to 165
Neiman Marcus (Neiman Marcus, Inc., Dallas, Tex.) (1 store in Plaza Frontenac)	15.0+
J.C. Penney (6 full-line stores, 6 soft goods stores)	125.0
South County	33.0
Saks Fifth Ave. (Saks Fifth Ave., New York, N.Y.) (1 store in Plaza Frontenac)	20.0
Sears Roebuck (7 full-line stores, 3 catalog-appliance outlets)	155.0
Northwest Plaza	40.0

(St. Louis Area continued)

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
MISSOURI	
St. Louis (continued)	
Stix, Baer & Fuller (Associated Dry Goods, New York, N.Y.) (13 stores: Ill. 2, Kans. 1, Mo. 10)	$ 141.0
Downtown	12.0
Chesterfield	16.5
Crestwood	13.0
Jamestown	9.5
Kansas City (3)	27.0
Northwest Plaza	12.5
St. Clair Square	10.0
South County	8.0
Springfield, Ill. (White Oaks Mall) (To be taken over by Kohl's Dept. Stores, Milwaukee)	4.0
Westroads (Division headquarters have re-located here, moving from downtown location)	20.5
Target (Dayton Hudson Corp., Minneapolis, Minn.) (10 stores)	135.0
Venture Stores (May Department Stores, St. Louis, Mo.) (12 stores)	120.0
Wal-Mart (Wal-Mart Stores, Bentonville, Ark.) (10 stores)	70.0
NEBRASKA	
Fremont	
Geo. Schweser's & Sons (8 stores)	9.0
Hastings	
J. M. McDonald Co. (57 specialty stores in North Central & West)	70.0+
Lincoln	
Miller & Paine Inc. (3 Neb. stores)	10.0+
Omaha	
J. L. Brandeis & Sons (10 stores: Ia. 2, Neb. 8)	80.0
Philips Stores (7 stores: Ia. 2, Neb. 5)	11.0
NORTH DAKOTA	
Bismarck	
A. W. Lucas (1 store)	5.0
Fargo	
Herbst Inc. (3 N.D. stores)	5.0
O. J. de Lendrecie Co. (Duluth Glass Block Stores, Duluth, Minn.)	4.0
OHIO	
Akron	
The M. O'Neil Co. (May Dept. Stores, St. Louis, Mo.) (10 Ohio stores)	126.0
Ashtabula	
Carlisle-Allen (11 stores: Ohio 6, Pa. 5)	45.0+

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
OHIO	
Bowling Green	
Fred W. Uhlman & Co. (11 Ohio dept. stores plus specialty stores in Ohio, Ind., Mich.)	$ 20.0
Cincinnati	
McAlpin Co. (Mercantile Stores, New York, N.Y.) (9 stores: Ohio 6, Ky. 3)	145.0
H. & S. Pogue Co. (Associated Dry Goods, New York, N.Y.) (5 Ohio stores)	63.0
Shillito's (Federated Dept. Stores, Cincinnati, Ohio) (9 stores: Ky. 4, Ohio 5)	221.1
(Merged with Rike's, Dayton, Ohio in April 1982. Name changed to Shillito's/Rike's. Will operate 14 department stores (10 in Ohio -- Dayton, Cincinnati and Springfield) and 4 in Kentucky -- Lexington, Louisville and Florence)	
Cleveland	
Halle's (acquired by Associated Investors Corp. from Marshall Field & Co., Chicago, Ill.) (16 stores of which all but 2 -- in Columbus -- were closed or sold in 1982)	90.0
Higbee's (May Department Stores, St. Louis, Mo.) (11 stores in Ohio)	206.3
The May Co. (May Dept. Stores, St. Louis, Mo.) (10 stores in Ohio)	222.0
Columbus	
F. & R. Lazarus (Federated Department Stores, Cincinnati, Ohio) (16 stores: Ohio 11, Ind. 4, W.Va. 1)	375.5
(2 former Halle units were re-opened by new owners as the Union Stores in Sept. 1982)	
Dayton	
Elder-Beerman Dept. Store Div. (Elder-Beerman Stores Corp.) (20 dept. stores)	190.0
Rike's (Federated Dept. Stores, Cincinnati, Ohio) (5 Ohio dept. stores plus 1 warehouse store)	120.9
(Merged with Shillito's, Cincinnati, April 1982)	
Jackson	
Stiffler Stores Inc. (16 stores)	4.0
Portsmouth	
Marting Bros. (2 stores)	7.0
Springfield	
Edward Wren Store (2 stores)	8.0
Toledo	
The Lion Dry Goods Co. (Mercantile Stores) (4 Ohio stores)	70.0

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
OHIO	
Wooster	
H. Freedlander Co. (1 store)	$ 5.0
Youngstown	
Strouss (May Dept. Stores, St. Louis, Mo.) (9 Ohio stores)	77.0
WISCONSIN	
Brookfield	
T. A. Chapman Co. (6 stores incl. 2 Manchester's specialty stores)	12.0+
Kohl's Department Stores (Batus Inc., New York, N.Y.) (14 Wis. stores)	87.1
Brookfield Square	10.0
Southridge	12.0
LaCrosse	
Wm. Doerflinger Co. (4 Wis. stores)	6.0
Marinette	
Lauerman Bros. Co. (4 Wis. stores)	5.5
Milwaukee (also see Brookfield)	
Boston Store (Federated Dept. Stores, Cincinnati, Ohio) (7 stores in Milwaukee area)	111.5
Gimbels-Midwest (Batus Inc., New York, N.Y.) (11 Wis. stores)	170.0
Milwaukee stores (8)	130.4
Mayfair	26.0
Southridge	25.0
Northridge	18.0
(2 stores were opened in 1981 -- in Racine and in Kenosha, and a replacement store in Capitol Court Mall. Grand Ave. Mall, Milwaukee store opened in 1982)	
Sheboygan	
H. C. Prange Co. (19 dept. stores: Ill. 2, Mich. 2, Wis. 15)	110.0
Wausau & Wisconsin Rapids	
Johnson Hills Dept. Stores (3 Wis. stores)	9.5

SOUTH

	Approx. Sales (Millions of $)
ALABAMA	
Birmingham	
Parisian Inc. (9 specialty stores in Ala.)	75.0
Pizitz, Inc. (12 stores in Ala.)	70.0
Florence	
Rogers Inc. (3 stores in Ala.)	5 to 10

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
ALABAMA	
Mobile	
C. J. Gayfer Co. (Mercantile Stores, New York, N.Y.) (12 stores: Ala. 3, Fla. 6, Miss. 3)	$ 130.0
Montgomery	
Gayfers (Mercantile Stores, New York, N.Y.) (6 stores)	50.0
ARKANSAS	
El Dorado	
J. A. West Co. (17 stores: in Ark., La., Mo., Okla., Tex. Also 4 Gibson's Department Stores)	24.0
Fayetteville	
Campbell-Bell Inc. (3 Ark. stores)	5.5
Fort Smith	
Boston Store (Boston Store Dry Goods Co., Fort Smith, Ark.) (2 Ark. stores)	10.0+
Hunt Dry Goods (9 stores: Ark. 6, Mo. 1, Okla. 1, Tex. 1)	10.5
Little Rock	
M. M. Cohn (8 specialty stores: Ark. 4, Tenn. 4. Acquired Clarke's Good Clothes, Tulsa, Okla., Dec. 1981)	35.0
Dillard Dept. Stores -- Little Rock Div. (Dillard Dept. Stores Inc., Little Rock, Ark.) (14 stores: Ark. 8, La. 3, Tenn. 1, Tex. 2)	178.0
(3 additional Memphis stores, formerly operated by Lowenstein's, were opened by Dillard in 1982. This is expected to bring the 40-store Memphis total annual volume to $45 to $50 million.)	
DELAWARE	
Wilmington	
Kennard's Dept. Stores (4 Del. stores)	5.0
DISTRICT OF COLUMBIA	
Washington Area (Including nearby Virginia and Maryland stores. Also see Baltimore, Md. listings.)	
Bloomingdale's (Bloomingdale's, New York, N.Y.) White Flint and Tyson's Corner, Va. (2 stores)	60 to 65
Garfinckel's (Allied Stores, New York, N.Y., Washington, D.C.) (8 specialty stores, 2 hotel shops)	80.0+
Hecht's (May Dept. Stores Co., St. Louis, Mo.) (22 stores: Md. 16, D.C. 1, Va. 5)	405.0
Washington, D.C. Div. (15 stores)	315.0
Baltimore, Md. Div. (7 stores)	90.0
(The Laurel, Md. store was replaced by a new store in 1981; 1st year volume expected to reach $18 to $20 million. A Bel Air, Md. store was opened Aug. 1981. Towson Plaza Mall store opened Fall 1982.)	

(Washington Area continued)

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
DISTRICT OF COLUMBIA	
Washington Area (continued)	
Neiman Marcus, Mazza Galleria, Chevy Chase (Neiman Marcus, Dallas, Texas)	$ 15.0
Raleigh's Stores (11 stores: D.C. 3, Va. 3, Md. 5)	60.0
Woodward & Lothrop (16 stores: D.C. 2, Md. 10, Va. 4)	334.8
Downtown (Washington, D.C.)	55.0
FLORIDA	
Bradenton	
Beall's Dept. Stores (26 stores in Florida)	40.0
Jacksonville	
Furchgott's Inc. (5 Fla. stores)	20.0
May-Cohens (May Dept. Stores, St. Louis, Mo.) (6 stores)	47.0
Miami-Palm Beach Area	
Burdine's (Federated Dept. Stores, Cincinnati, Ohio) (21 Fla. stores)	565.5
Dadeland Shopping Center	100.0
(Mayfair Coconut Grove, Fla. store to open in Winter 1983)	
J. Byron's (Jack Eckerd Corp., Clearwater, Fla.) (39 Fla. stores)	148.9
Jordan Marsh Florida (Allied Stores, New York, N.Y.)(13 Fla. stores)	210.0
(Miami International Mall Store opened August 1982)	
(Lord Taylor opened a store at Cutler Ridge, Miami in June 1982. A Miami International Mall unit will be opened in 1983)	
Tallahassee	
William Henry Inc. (7 stores: Fla. 1, Ala. 3, Ga. 1, Ky. 2)	7.5
(Also operates specialty stores in Ala. & Fla.)	
Tampa-St. Petersburg Area	
Maas Bros. Tampa (Allied Stores, New York, N.Y.) (19 Fla. stores. Northgate Shopping Center store closed in 1982)	265.0
Robinson's of Florida, St. Petersburg (Associated Dry Goods, New York, N.Y.) (7 stores in Fla.)	65.0
(South Orlando store to be opened in 1983)	
Winter Park	
Ivey's Florida (Marshall Field, Chicago, Ill.) (10 Fla. stores)	75.0
GEORGIA	
Atlanta Area	
Davison's (R. H. Macy, New York, N.Y.) (12 stores: Ga. 11, S.C. 1)	214.0
(Perimeter Mall store opened Sept. 1982. Gwinnett Place, Ga. store to open in Spring 1984.)	
H. Kessler & Co. (6 Ga. stores plus wholesaling operation)	12.0
Muse's (George Muse Clothing Co.) (11 stores)	18.0
Atlanta area (7 stores)	15.0
Columbia, S.C. (4 Berry's-on-Main stores)	3.0

(Atlanta Area continued)

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
GEORGIA	
Atlanta Area (continued)	
Rich's (Federated Dept. Stores, Cincinnati, Ohio) (17 stores: Ga. 13, Ala. 2, S.C. 2) (Rich's also operated 21 Richway Discount stores with a volume of $266.2 million)	$ 398.8
Augusta	
J. B. White & Co. (Mercantile Stores, New York, N.Y.) (3 Ga. stores)	15.0+
Columbus	
J. A. Kirven (3 stores in Ga.)	8.0
Cordele	
B. C. Moore (B. C. Moore & Sons, Wadesboro, N.C.) (26 stores)	18.0
Savannah	
Allied Outlet Stores (60 stores in Ga. and S.C.)	30.0
Levy's of Savannah Inc. (Allied Stores) (1 store)	6.5
KENTUCKY	
Danville	
Hub Frankel Co. (1 store)	5.0
Louisville	
J. Bacon & Co. (Mercantile Stores) (5 stores)	30.0+
Ben Snyder Inc. (7 stores)	21.0
Stewart Dry Goods (Associated Dry Goods, New York, N.Y.) (7 stores)	64.0
Owensboro	
S. W. Anderson Co. (2 stores)	7.0
LOUISIANA	
Alexandria	
Wellan's (2 stores)	7.8
Baton Rouge	
Goudchaux's Inc. (3 La. stores) (Purchased 3 suburban Maison Blanche stores in 1982, which had a combined sales volume of $50 million)	98.0
DeRidder	
West Bros Inc. (30 stores in Ala., Fla., La., Miss.)	60.0
Lake Charles	
Muller Co. Ltd. (Allied Stores, New York, N.Y.) (2 La. stores)	10.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
LOUISIANA	
New Orleans	
Leon Godchaux Clothing Co. (7 stores: La. 6, Miss. 1)	$ 35.0
D. H. Holmes Co. Ltd. (13 stores: La. 11, Miss. 1, Ala. 1)	221.0
Krauss Co. Ltd. (1 store)	20.0
Maison Blanche (City Stores, New York, N.Y.) (8 stores: La. 4, Tenn. 4)	60.0
(3 suburban stores with volume of $50 million sold to Goudchaux's, Baton Rouge in 1982)	
Ruston	
Lewis & Co. (3 stores incl. Fever Tree and Stagg Shop)	9.0
Shreveport	
Rubenstein's Inc. (4 La. stores)	10.0
MARYLAND	
Baltimore (Also see District of Columbia listings)	
Brager-Gutman (HRT Ltd., Honolulu, Hawaii) (2 stores in Md.)	13.0
L. Epstein (7 Baltimore Stores)	20.0
(Also operates a wholesaling business)	
Hecht's (Hecht's, Washington, D.C.) (6 stores in Baltimore Division)	90.0
(Towson Plaza Mall store opened in Fall 1982)	
Hochschild, Kohn Inc. (Supermarkets General, Woodbridge, N.J.) (10 stores)	74.0
Hutzler's (8 Md. stores)	75 to 80
I. Magnin, White Flint Mall, Bethesda, Md.	12.0
Montgomery Ward	100.0+
Sears Roebuck	100.0
Stewart's (Associated Dry Goods, New York, N.Y.)(5 stores)	45.0
(To be taken over by Associated Dry Goods' Caldor subdivision in Spring 1983)	
(Bambergers opened a store at White Marsh Mall and one at Hunt Valley Mall in Aug./Sept. 1981. 1st year combined volume is expected to reach $45-to-$50 million. Woodward & Lothrop opened a store at White Marsh Mall in August 1981.)	
MISSISSIPPI	
Hattiesburg	
The Vogue (Fein Bros.-Matison) (2 stores)	6.0
Jackson	
McRae's Inc. (13 Miss. stores. Also a shoe store)	120.0
Meridian	
Marks Rothenberg Co. (3 stores)	5.0
NORTH CAROLINA	
Charlotte	
Collins Dept. Stores (10 stores: N.C. 7, S.C. 3)	20.0
Crest Stores (31 specialty stores)	22.0+
Ivey's Carolinas (J.B. Ivey Co. Div. of Marshall Field & Co., Chicago, Ill.) (13 N.C. stores)	95.0

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
NORTH CAROLINA	
Whiteville	
Leder Bros. (10 stores in N.C. and S.C.)	$ 6.0
Winston-Salem	
Davis Inc. (3 stores)	6.0
OKLAHOMA	
Checotah	
Sharpe Dept. Store (19 stores)	7.5
Norman	
Harold's (7 stores)	5.0
Oklahoma City	
John A. Brown Co. (Dayton-Hudson, Minneapolis, Minn.) (6 stores in Okla.)	77.0
Shawnee	
Newton Wall Co. (13 stores: Okla. 9, Ark. 1, Miss. 3)	7.0
Tulsa	
Clarke's (5 stores. Downtown Tulsa store closed, rest remodeled).	16.0
Froug's, Inc (10 stores)	20.0
SOUTH CAROLINA	
Charleston	
Condon's Dept. Store (2 stores)	5.0
Kerrison's Dept. Store (4 S.C. stores)	11.0
Cheraw	
B. C. Moore (B. C. Moore & Sons, Wadesboro, N.D.) (46 stores)	30.0
Columbia	
James L. Tapp Co. (4 S.C. stores)	12.0
J. B. White & Co. (Mercantile Stores, New York, N.Y.) (3 stores)	15.0
Greenville	
Meyers-Arnold Co. (9 stores: S.C. 5, N.C. 2, Ga. 2)	28.0
Hartsville	
J. L. Coker (4 S.C. stores)	8.0
Spartanburg	
The Aug. W. Smith Co. (4 stores in S.C.)	6.0
TENNESSEE	
Alcoa	
Proffitt's Dept. Stores (4 stores in Tenn.)	33.0

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
TENNESSEE	
Bristol	
H.P. King (2 Tenn. stores)	$ 3.5
Chattanooga	
Loveman's (5 stores: Tenn. 4, Ga. 1)	30.0
Jackson	
Kisber's Dept. Store (2 Tenn. stores)	6.0
Knoxville	
Millers Inc. (Allied Stores, New York, N.Y.) (11 stores: Tenn. 9, Ga. 1, Va. 1)	80.0
Ira A. Watson (16 stores: Ala. 2, Ky. 6, Tenn. 4, Va. 1, W.Va. 3)	35.0+
Memphis	
Goldsmith's (Federated Department Stores, Cincinnati, Ohio) (6 stores in Tenn.)	125.2
(Dillard opened 3 stores in addition to existing store, in former Lowenstein locations in suburban Memphis. Expected annual vol. for 4 stores: $45-$50 mil.)	
Nashville	
Cain-Sloan (Allied Stores, New York, N.Y.) (4 stores in Tenn.)	60.0
Castner, Knott Dry Goods Co. (Mercantile Stores) (10 stores: Ala. 2, Ky. 1, Tenn. 7)	100.0
The Harvey Co. (7 stores: Ky. 2, Tenn. 5)	29.0
TEXAS	
Abilene	
Thornton's Department Stores (P.N. Hirsch & Co.) (St. Louis, Mo.) (8 Texas stores)	10.0
Austin	
Joske's (Joske's-Houston, Houston, Tex.) Highland Mall (1 store)	33.0
Scarbrough's (4 Texas stores plus 2 boutiques)	24.0+
Highland Mall	13.0
Foley's (Foley's, Houston, Tex.) Highland Mall (1 store)	34.0
(A 2nd store will be opened, in Barton Creek, and a 3rd in Austin is planned)	
Beaumont	
The Fair Inc. (25 stores in Tex. and La., also operates a wholesaling business)	55.0+
White House Co. (Boston Store D.G. Co., Fort Smith, Ark.) (3 stores: Tex. 2, La. 3)	20.0
(2 Beaumont area stores to be opened in 1983 incl. a replacement downtown store)	

DEPARTMENT STORE SALES

SOUTH

TEXAS

Dallas (also see Fort Worth listings)

	Approx. Sales (Millions of $)
J. Brannam (F. W. Woolworth Co., New York, N.Y.) (5 Dallas-Fort Worth stores)	$ 10 to 13
Dillard's (Dillard Department Stores, Central Division, Fort Worth)	
Dallas-Fort Worth (10 stores)	90 to 95
Valley View	22.0
Richardson Square	15.0+
(Collin Creek Mall, Plano store opened July 1981)	
Frost Bros. (Frost Bros., San Antonio, Texas)	
NorthPark (opened Fall 1981) Projected rate 1st year	6.0
Joske's-Dallas/Phoenix (Allied Stores, New York, N.Y.) (12 stores: Texas 10, Ariz. 2)	100 to 105
Dallas area (10 stores)	90.0
NorthPark	27.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	27.0
NorthPark	15.0
Prestonwood Town Center	10.0
Collin Creek Mall, Plano (opened Oct. 1981)	2.0
Montgomery Ward (Montgomery Ward, Chicago, Ill.)	
Dallas-Fort Worth area (12 stores)	135 to 140
Prestonwood Town Center	10.0
Neiman-Marcus (Carter Hawley Hale, Los Angeles, Calif.) (16 stores: Tex. 5, Ga. 1, Fla. 1, Md. 1, N.Y. 1, Ill. 2, Mo. 1, Ca. 3, Nev. 1)	450.0
Dallas-Fort Worth area (4 stores)	150.0
Downtown Dallas	49.0
NorthPark	53.5
Prestonwood Town Center	25.0
Fort Worth	22.5
Other Neiman-Marcus stores (available figures)	
Galleria, Houston	56.0
Chicago (2 stores)	30.0
Plaza Frontenac, St. Louis	15.0
Mazza Galleria, Chevy Chase, Md.	15.0
Fashion Show, Las Vegas, Nev. (opened Feb. 1981) Projected 1st year volume:	14.0
Fashion Valley, Dan Diego, Calif. (opened Sept. 1981) Projected 1st year volume:	16.5
(A San Francisco store was opened Nov. 1982. 1st year volume projected to $40 million. A second Houston store is to be opened in 1983)	
J.C. Penney (15 stores)	120.0
NorthPark	27.0
(Collin Creek Mall, Plano store to open in 1983)	
Sakowitz (Sakowitz Inc., Houston, Tex.)	
Dallas store (opened July 1981) Projected annual volume the 1st year:	14 to 18

(Dallas Area continued)

DEPARTMENT STORE SALES

SOUTH

TEXAS

	Approx. Sales (Millions of $)
Dallas (continued)	
Sanger-Harris (Federated Department Stores, Cincinnati, Ohio) (13 stores in Tex. In Oct. 1982 assigned responsibility for Levy's, Tucscon, Ariz.)	$ 298.9
Downtown Dallas	28.0
Huelen Mall	26.0
North Hills Mall	18.0
Preston Center	35.0
Valley View	60.0
Sears, Roebuck (Sears, Roebuck, Chicago, Ill.) (13 stores)	286.0
Valley View	49.0
Suzanne S (38 specialty stores, incl. 19 in Dallas-Fort Worth area)	24.0
Target Stores (Dayton-Hudson) (10 stores)	145.0
(1982 store openings, Dallas Galleria, Oct. 1982: Saks Fifth Ave. -- expected annual volume 1st year: $20 million plus; Marshall Field -- expected annual volume 1st year: $12-$15 million. Bloomingdale's will open at Valley View Mall in 1983.)	
El Paso	
Popular Dry Goods Co. (3 stores in El Paso)	30.0
Fort Worth (also see Dallas listings)	
R. E. Cox & Co. (5 stores in Tex. incl. 3 in Fort Worth)	25 to 30
Dillard Dept. Stores - Central Division (Dillard Dept. Stores Inc., Little Rock, Ark.) (24 stores: Kans. 2, Mo. 1, Okla. 8, Tex. 13)	225.0
Dallas-Fort Worth (10 stores)	90 to 95
Monnig's (6 stores in Texas)	30.0+
Montgomery Ward (Montgomery Ward, Chicago, Ill.)	
Dallas-Fort Worth (12 stores)	135 to 140
Striplings (The Dunlap Co., Fort Worth, Tex.) (3 stores)	25.0
Houston	
Foley's (Federated Department Stores, Cincinnati, Ohio) (12 stores in Tex. plus warehouse operation)	547.3
Downtown	78.0
Highland Mall, Austin	34.0
Memorial City	70.0
Sharpstown	86.0
(2 stores were opened in the Fall of 1981: Willowbrook, Houston and North Star Mall, San Antonio. A store is to be opened in Austin)	
Frost Bros. (Frost Bros., San Antonio, Tex.) (3 Houston stores)	27.0
Joske's-Houston (Allied Stores, New York, N.Y.) (9 stores)	125.0
Post Oak	33.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	39.0
Galleria (Houston)	20.0
Greenspoint Mall	8.0
Memorial City	11.0
(A 4th store, at West Oaks, is to be opened in Feb. 1984. Expect a volume of $10 million the 1st year.)	

(Houston Area continued)

SOUTH	Approx. Sales (Millions of $)
TEXAS	
Houston (continued)	
Marshall Field (Marshall Field & Co., Chicago, Ill.)	
Galleria (1 store)	$ 24.0
Montgomery Ward (Marcor Inc., Wilmington, Del.) (9 Houston area stores, 1 Beaumont store)	165.0
(San Jacinto Mall, Baytown store and Willowbrook, Houston store opened Sept. 1981)	
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.)	
Galleria (1 store)	56.0
(A 2nd store, in Town & Country Village, is to be opened in Spring 1983. Projected vol. 1st full year: $20 million.)	
Palais Royal of Houston (19 stores in Houston area, 1 in Orange, Tex., 1 in Beaumont, Tex.)	90.0
(San Jacinto Mall, Baytown and Willowbrook, Houston stores were opened in 1981.)	
J.C. Penney (9 stores, including 5 full-line stores)	132.0
(A store in San Jacinto Mall, Baytown, will be opened in Feb. 1983; Town & Country store, July 1983.)	
Sakowitz Inc. (15 stores incl. 4 full-line stores in Houston plus 2 smaller units and 3 boutiques; 1 store in Amarillo, 1 in Scottsdale, Ariz.; Dallas, 4 boutiques)	125.0
Houston stores	90.0
Other stores	35.0
(The Dallas store was opened July 1981. Annual rate projected for 1st full year:	14 to 18
Post Oak	50.0
(In 1982 hotel boutiques were opened in Dallas and in Houston; a Midland, Texas store was opened in Feb. 1982. A Tulsa store is planned for a 1983 opening; San Antonio in 1984.)	
Saks Fifth Avenue Center of Fashion (Saks Fifth Avenue, New York, N.Y.)(1 store)	26.5
Laredo	
Richter's Dept. Store (1 store)	7.0
Lubbock	
Hemphill-Wells Co. (4 Texas stores)	20.0+
McAllen	
Jones & Jones (1 store)	13.0
San Antonio	
Dillard Dept. Stores, Texas-New Mexico Division (Dillard Dept. Stores, Little Rock, Ark.) (18 stores)	190.0
Frost Bros. (Manhattan Industries, New York, N.Y.) (12 stores in Texas)	105.0
Houston (3 stores)	27.0
NorthPark, Dallas (opened Fall 1981) Projected annual rate the 1st year:	6.0
(A replacement store in Corpus Christi was opened in 1981)	
Joske Bros. (Allied Stores, New York, N.Y.) (8 stores in Texas)	95.0

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
TEXAS	
Wichita Falls	
McClurkan's Dept. Store (4 stores)	$ 9.0
Perkins-Timberlake (9 stores: Texas 7, Okla. 2)	10.0
VIRGINIA	
Arlington (also see District of Columbia listings)	
Morton's (6 stores)	8.0
Kilmarnock	
Colonial Variety Store (Southern Dept. Stores Inc., Richmond, Va.) (6 stores)	5.0
Lawrenceville	
W. S. Peebles & Co. (41 stores plus wholesaling operation)	14.0+
Martinsville	
Globman's Stores (3 Va. stores)	8.5
Norfolk	
Rice's-Nachmans (Phillips-Van Heusen Corp., New York, N.Y.) (7 Va. stores)	10.0
Smith & Welton (8 Va. stores)	17.0
Richmond	
Miller & Rhoads (Allied Stores, New York, N.Y.) (22 stores: Va. 16, N.C. 3, Va. 3)	110.0
Southern Dept Stores Inc. (6 stores)	5.0
Thalhimer's (Carter Hawley Hale, Los Angeles, Calif.) (25 stores: Va. 13, N.C. 11, S.C. 1)	185.0
Roanoke	
Heironimus (4 stores)	12.0
Williamsburg	
Casey's Inc. (Southern Department Stores, Richmond, Va.) (1 store)	3.1
WEST VIRGINIA	
Charleston	
A. W. Cox Dept. Store (15 stores in W. Va., Ky., Ohio)	9.0
The Diamond Dept. Store (Associated Dry Goods, New York, N.Y.) (2 stores in W. Va.)	18.0
Holden	
Island Creek Stores Co. (15 stores in W.Va., Va., Ky.)	8.0
Logan	
Sayer Bros. (S & B Wholesale Distributors) (6 stores)	7.0
Parkersburg	
Dils Bros. (2 stores)	6.2

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
SOUTH	
WEST VIRGINIA	
Wheeling	
Good's Department Stores Inc. (L.S. Good & Co., Wheeling, W.Va.) (2 stores)	$ 12.0
Stone & Thomas (14 stores in W.Va. incl. specialty stores)	65.0+
WEST	
ARIZONA	
Douglas	
Phelps Dodge Mercantile Co. (7 stores: Ariz. 5, N.M. 2)	35.0
Phoenix/Scottsdale Area	
Broadway-Southwest Div., Mesa, Arizona (Carter Hawley Hale, Los Angeles, Calif.) (9 stores: Ariz. 6, Nev. 2, N.M. 1)	109.0
Diamond's, Tempe, Ariz. (Dayton Hudson, Minneapolis, Minn.) (13 stores: Ariz. 10, Nev. 3)	140.3
(A store in Fashion Show Center, Las Vegas, Nev. was opened in Feb. 1981. Expected 1st year volume: $14 to $16 million. An 8th Phoenix store was opened in 1981)	
Goldwater's, Scottsdale (Associated Dry Goods, New York, N.Y.) (8 stores: Ariz. 6, N.M. 1, Nev. 1)	87.0
(A Foothills Mall, Tucson, Ariz. store was opened in Aug. 1982)	
Las Vegas, Nev.	15.0
Tucson	
Levy's of Tucson (Federated Department Stores, Cincinnati, Ohio) (1 store)	44.3
(Effective Oct. 1982 Levy's of Tucson will report to Sanger-Harris Div., Dallas, Tex.)	
(A 2nd Tucson store was opened by The Broadway-Southwest in Fall 1982)	
CALIFORNIA	
Bakersfield	
Brock's Dept. Store (2 stores)	17.0
Carson	
The Boston Stores Inc. (12 stores: Ariz. 2, Calif. 10)	21.0
Castro Valley	
Daughtery's Dept. Store (3 Calif. stores)	10.0
Eureka	
Meyer Bistrin's Inc. (18 stores)	9.0
Fresno	
E. Gottschalk & Co. (7 stores in Calif. incl. Fashion Fair plus 14 Bobbie West and Village East specialty stores)	90.0+

(continued)

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
CALIFORNIA	
Fresno (continued)	
E. Gottschalk & Co. (continued)	
Downtown Fresno	$ 15.0
Merced (a replacement store to be opened in Mar. 1983. Projected 1st year vol.: $10.0 million)	
Fashion Fair (Fresno)	20.0
(Macy's California will open a store in Fresno in the Fall of 1983 in Fashion Fair Mall)	
Glendale	
H. S. Webb & Co. (2 stores)	8.0
Huntington Park	
Wineman's Dept. Store (5 Calif. stores)	12.0
Los Angeles/Long Beach Area	
Abercrombie & Fitch (Oshman's, Houston, Tex.) (3 full-line specialty stores: Beverly Hills, Dallas, Houston; 4 smaller stores: Costa Mesa, Las Vegas, Georgetown, Philadelphia)	7.0
Broadway-Southern California (Carter Hawley Hale, Los Angeles, Calif.) (40 stores)	670.0
Anaheim	15.5
Bakersfield	12.0
Brea	13.4
Carlsbad	11.0
Carson	10.0
Century City	29.0
Cerritos	18.0
Chula Vista	19.0
Crenshaw	9.5
Del Amo	31.0
Downey	17.4
Fox Hills	21.0
Glendale	25.0
Grossmont	15.2
Hawthorne	12.0
Hollywood	8.0
Huntington Beach	19.0
La Jolla	15.0
Laguna Hills	16.0
Long Beach	13.5
Los Angeles (downtown)	25.0
Montclair	14.0
Newport Beach	15.0
Northridge	22.0
Orange	17.0
Panorama City	19.0
Pasadena	14.4

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
Broadway-Southern California (continued)	
Puente Hills	$ 16.0
Riverside	12.8
San Bernardino	13.5
San Diego	24.0
Santa Anita	21.2
Santa Monica	19.0
Sherman Oaks	21.0
Topanga Plaza	17.0
Thousand Oaks	13.3
Ventura	15.0
West Covina	16.0
Westchester	9.6
Whittier	10.0
(La Cienega Blvd., Beverly Center store opened March 1982. Expected volume the 1st year: $24 to $25 million)	
Buffum's, Long Island (11 junior department stores and 4 Buffum's Sportswear Shops)	109.0
Arcadia	8.0
Glendale Grossmont	5.5
Laguna Hills	6.0
La Habra	5.4
Lakewood	4.0
Long Beach	8.0
Long Beach Marina	4.5
Manhattan Beach	8.2
Newport	5.8
Palos Verdes	9.2
Pomona	6.3
San Diego	12.6
Santa Ana	5.8
Westminster	9.0
Bullock's (Federated Department Stores, Cincinnati, Ohio) (18 stores: Calif. 15, Nev. 1, Ariz. 2)	499.9
(2 stores were opened in Feb. 1982: at the Beverly Hills Center and in Manhattan Beach)	
Bullock's Wilshire (Division of Bullock's, Los Angeles) (6 specialty stores)	65.0
Contempo Casuals (Carter Hawley Hale, Los Angeles, Calif.) (55 stores)	45.0
Harris Co., San Bernardino (5 stores)	30.0
H. C. Henshey Co., Santa Monica (2 stores)	9.0
Hinshaw's Dept. Stores, Whittier (2 stores)	25.0
Judy's Inc., Van Nuys (72 stores)	49.6
I. Magnin (Southern Division of I. Magnin & Co., San Francisco) (10 stores)	93.0
Beverly Hills	26.0
South Coast Plaza, Costa Mesa	15.0

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
May Co.--California, Los Angeles (May Dept. Stores, St. Louis, Mo.) (33 stores)	615.0
Arcadia	17.5
Brea	17.0
Buena Park	18.0
Canoga Park (Tipanga Plaza)	24.0
Carlsbad	15.8
Cerritos	3.0
Costa Mesa	36.0
Crenshaw	11.0
Eagle Rock	20.0
El Cajon	13.2
Fox Hills	21.0
La Jolla	11.0
Lakewood	30.5
Los Angeles (downtown)	33.0
Laurel Plaza	30.0
Mission Viejo	14.0
Montclair	15.4
Oxnard	13.0
Palos Verdes (opened Aug. 1981)	6.0
Pasadena	5.8
Plaza Bonita (opened Mar. 1981)	11.0
Redondo Beach	34.0
Riverside	14.0
San Bernardino	15.0
San Diego	29.0
Sherman Oaks	12.4
The City	14.0
Thousand Oaks	15.0
Eastland	20.0
Westland	27.0
Westminster	23.0
Whittier	12.0
Wilshire	32.0
(Palm Desert Town Center store opened in 1982. The May Co. will open 7 additional Calif. stores through 1985, including a downtown L.A. store scheduled for a 1983 opening.)	
Mervyn's, Hayward, Calif. (Dayton Hudson, Minneapolis, Minn.) (21 stores in Southern Calif. area, including 4 opened in 1981.)	200.0+
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (2 stores)	55.0
Beverly Hills	39.0
Fashion Island, Newport Beach	16.0
(Also operates 2 stores in San Diego)	

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
Los Angeles/Long Beach Area (continued)	
Nordstrom (Nordstrom's, Seattle, Wash.) (4 Southern Calif. stores)	90.0
South Coast Plaza, Costa Mesa	43.0
Brea	18.0
Cerritos (opened in 1981)	13.0
San Diego	16.0
J.C. Penney (26 full-line and 27 smaller stores in Southern Calif.)	400.0
J.W. Robinson (Associated Dry Goods, New York, N.Y.) (21 stores in Calif.)	378.0
Downtown Los Angeles	27.5
Anaheim	12.3
Arcadia	14.1
Beverly Hills	39.0
Cerritos (Renovated in 1981)	15.7
Del Amo (opened Aug. 1981)	14.0
Glendale	17.3
Mission Viejo	9.0
Newport Beach (Renovated in 1981)	28.0
Palm Springs	4.2
Panorama City	11.0
Pasadena	14.5
Puente Hills	16.6
San Diego (Renovated in 1981)	22.0
Santa Barbara	28.0
Santa Monica (opened in Aug. 1981)	14.0
Sherman Oaks	13.0
Thousand Oaks	14.8
University Town Center	16.8
Westminster	16.4
Woodland Hills	30.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (5 stores in Southern California)	72.0
Beverly Hills	31.0+
South Coast Plaza, Costa Mesa	14.0
Woodland Hills	17.0
Sears, Roebuck (Sears, Roebuck & Co., Chicago, Ill.)	800.0
Modesto	
C. H. Dunlap (4 specialty stores in Calif.)	11.0
Loeb's Dept. Store (1 store)	2.0
(Macy's California opened a store in Modesto in August 1981)	
Orange	
Louis Miller Inc. (5 stores)	12.0
Pacific Grove	
Holman's Dept. Store Inc. (3 stores)	10.0

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
Sacramento	
Weinstock's (Carter Hawley Hale, Los Angeles, Calif.) (12 stores: Calif. 8, Nev. 1, Utah 3)	144.0
Sacramento stores, total	73.2
Downtown	15.0
Arden Fair	11.2
Country Club	18.0
Florin	11.0
Sunrise	18.0
Other stores:	
Fresno	15.0
Modesto	10.0
Stockton	11.0
Reno, Nev.	14.0
Murray, Utah	7.5
Ogden, Utah (opened Aug. 1981)	4.5
Salt Lake City, Utah	8.5
San Bernardino	
Harris Co. (5 stores)	30.0
San Diego (Also see Los Angeles listings)	
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.)	
San Diego	15.0
Fashion Valley (opened Sept. 1981)	7.5
Nordstrom (Nordstrom Inc., Seattle, Wash.)	
Fashion Valley (opened Aug. 1981)	16.0
(3 additional area stores to be opened in 1984/1985)	
Walker Scott (12 department and specialty stores in Southern Calif.)	45.4
San Francisco/Oakland	
Bullock's-Northern California, Palo Alto (Federated Dept. Stores, Cincinnati, Ohio) (6 Calif. stores)	88.6
Emporium Capwell (Carter Hawley Hale, Los Angeles, Calif.) (20 Calif. stores)	500.0
Liberty-House California, Oakland (Amfac Inc., Honolulu, Hawaii) (14 stores: Calif. 13, Nev. 1)	127.0
(2 stores, Hayward and Dublin branches, to be closed Jan. 1983)	
Hayward	10.0
Dublin	6.0
Macy's California (R. H. Macy, New York, N.Y.) (21 stores: Calif. 20, Nev. 1)	670.0
Union Sq., San Francisco	131.0
(Fashion Fair, Fresno, Calif. store to open in Fall 1983; Solano and Corte Madera, Calif. stores to open in 1984)	

(San Francisco/Oakland Area continued)

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
San Francisco/Oakland (continued)	
I. Magnin (Federated Dept. Stores, Cincinnati, Ohio) (25 stores: Calif. 18, Ariz. 1, Ore. 1, Wash. 1, Ill. 3, Md. 1)	$ 257.6
Northern California Area	100.0+
Union Square, San Francisco	55.4
Southern Division, Los Angeles	93.0
Joseph Magnin (Acquired by Acquihold Corp., San Francisco, from Hillman Co. in Dec. 1982) (37 specialty stores plus 7 franchised Gucci operations) (Plans were announced to close 14 stores in 1983, leaving 22 Joseph Magnin stores and 7 freestanding Gucci units in operation at the end of 1983.)	100.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (3 Northern California stores) (A replacement for the downtown store was opened in August 1981. Reached an annual rate of $36 million in the first full year.)	40.0+
Smith's Clothiers of California, Oakland, Calif. (24 stores: Calif. 23, Nev. 1)	23.0
San Mateo	
Levy Brothers Dept. Store (7 Calif. stores)	10.0
Santa Cruz	
Samuel Leask (2 California stores)	5.0
Santa Monica	
H. C. Henshey Co. (2 California stores)	10.0
Santa Rosa	
Rosenberg's Inc. (Gamble Dept. Stores, Chicago, Ill.) (1 store)	10.0
Sun Valley	
Nahas Enterprises (13 stores in Calif.)	19.0
Watsonville	
Charles Ford & Co. (5 department stores and 3 specialty stores in Calif.)	15.0
COLORADO	
Denver	
Denver Dry Goods Co. (Associated Dry Goods, New York, N.Y.) (12 Colorado stores) (A 13th store will be opened in March 1983 in Southwest Plaza, Denver)	120.0
Fashion Bar (73 specialty stores)	60.0
Joslin Dry Goods (Mercantile Stores, New York, N.Y.)(5 Colorado stores)	95.0
May-D & F (May Department Stores, Denver, Colo.) (9 stores)	120.0
Neusteters (4 stores)	20.0

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
HAWAII	
Honolulu	
Liberty House (Amfac Inc., Honolulu) (6 department stores and 41 resort/specialty shops in Hawaii) (Kaui stores were closed in May 1981)	$ 166.7
Shirokiya Inc. (6 stores)	26.0
IDAHO	
Boise	
The Bazaar (3 stores)	6.0
The Mode (2 stores)	5.0
Shaver's Inc. (4 stores)	8.5
MONTANA	
Billings	
Hart-Albin (2 dept. stores plus men's store & book store)	9.0
NEVADA	
Las Vegas	
Bullock's (Bullock's South, Los Angeles, Calif.)	16.0
Diamond's (Diamond's, Tempe, Ariz.)	14 to 16
Goldwater's (Goldwater's, Scottsdale, Ariz.)	15.0
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.)	14.0
Saks (Saks Fifth Avenue, New York, N.Y.)	8.0
OREGON	
Portland	
Meier & Frank (May Department Stores, St. Louis, Mo.) (7 stores: Oregon 6, Wash. 1)	175.0
Downtown Portland	32.0
UTAH	
Salt Lake City	
ZCMI Department Store (Zion's Co-Operative Mercantile Institution) (8 stores: Utah 7, Idaho 1)	134.2
Pasco	
Grigg Enterprises (5 stores)	12.0
WASHINGTON	
Seattle/Everett/Spokane Area (The Northwest)	
The Bon (Allied Stores, New York, N.Y.) (32 stores: Wash. 15, Ore. 6, Idaho 6, Mont. 3, Utah 2)	344.0
The Crescent (Marshall Field, Chicago, Ill.) (3 Spokane stores)	36.0+
Frederick & Nelson, Seattle (Marshall Field, Chicago, Ill.) (15 stores: Wash. 8, Ore. 7)	215.0
Jay Jacobs, Seattle (42 specialty stores)	21.0
Lamont's Apparel, Seattle (Pay 'N Save) (23 stores in Wash., Alaska, Ore., Idaho)	80.0

DEPARTMENT STORE VOLUME LEADERS

Following is a compilation of leading department stores, listed by buying or divisional headquarter locations, and showing the total reported or estimated sales for the year 1981 (or closest fiscal period) attributed to each headquarter operation. This includes sales of all stores (limited to department stores where possible) operated by the listed company. Not included in this list are national chains, such as Sears, Ward and Penney, promotional chains, such as K mart, and national chain department stores without divisional buying operations.

STORES WITH SALES OF $100 MILLION & OVER

	Sales Volume (Millions of $)
Macy's New York, N.Y. (R.H. Macy) (15 stores plus furniture clearance and auto centers)	$ 875.0
Bamberger's, Newark, N.J. (R.H. Macy) (23 stores)	800.0
Saks Fifth Avenue, New York, N.Y. (Batus, Inc.)	712.0
Macy's California, San Francisco, Calif. (R.H. Macy) (19 stores)	670.0
Broadway Southern California, Los Angeles, Calif. (Carter Hawley Hale) (40 stores)	670.0
J.L. Hudson, Detroit, Mich. (Dayton Hudson) (19 stores)	658.1
Bloomingdale's, New York, N.Y. (Federated) (16 stores)	647.4
May Company-California, Los Angeles, Calif. (May Department Stores) (33 stores)	615.0
Marshall Field, Chicago, Ill. (Batus, Inc.) (19 stores)	610.0
Abraham & Straus, Brooklyn, N.Y. (Federated) (14 stores)	605.0
Burdine's, Miami, Fla. (Federated) (21 stores)	565.5
Foley's, Houston, Tex. (Federated) (12 stores)	547.3
Lord & Taylor, New York, N.Y. (Associated Dry Goods) (37 stores)	528.0
Alexander's, New York, N.Y. (16 stores)	523.6
Capwell's, San Francisco, Calif. (Carter Hawley Hale) (20 stores)	500.0
Bullock's, Los Angeles, Calif. (Federated) (18 stores)	499.9
Neiman Marcus, Dallas, Texas (Carter Hawley Hale) (16 stores)	450.0
Strawbridge & Clothier, Philadelphia, Pa. (Allied Stores) (11 stores)	425.6

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER (continued)

	Sales Volume (Millions of $)
Jordan Marsh, Boston, Mass. (Allied Stores) (14 stores)	$ 416.0
Dayton's, Minneapolis, Minn. (Dayton Hudson) (13 stores)	410.1
Hecht's, Washington, D.C.-Baltimore, Md. (May Dept. Stores) (21 stores)	405.0
Rich's Inc., Atlanta, Ga. (Federated) (17 stores)	398.8
Robinson's, Los Angeles, Calif. (Associated Dry Goods) (21 stores)	378.0
F & R Lazarus, Columbus, Ohio (Federated) (16 stores)	375.5
The Bon, Seattle, Wash. (Allied Stores) (32 stores)	344.0
John Wanamaker, Philadelphia, Pa. (Carter Hawley Hale) (16 stores)	335.0
Woodward & Lothrop, Washington, D.C. (15 stores)	334.8
Famous Barr, St. Louis, Mo. (May Dept. Stores) (14 stores)	328.0
Filene's, Boston, Mass. (Federated) (17 stores)	321.6
Carson Pirie Scott, Chicago, Ill. (24 stores)	311.1
Sanger Harris, Dallas, Tex. (Federated) (13 stores)	298.9
B. Altman, New York, N.Y. (The Altman Foundation) (6 stores)	295.0
Kaufmann's, Pittsburgh, Pa. (May Dept. Stores) (10 stores)	287.0
Strawbridge & Clothier, Philadelphia, Pa. (11 stores)	275.0
Gimbel's New York, New York, N.Y. (Batus, Inc.) (10 stores)	270.0
Maas Bros., Inc., Tampa, Fla. (Allied Stores) (19 stores)	265.0
I. Magnin, San Francisco, Calif. (Federated) (25 stores)	257.6
Dillard Dept. Stores-Central Div., Fort Worth, Tex. (Dillard Dept. Stores) (24 stores)	225.0
The May Co., Cleveland, Ohio (May Dept. Stores) (10 stores)	222.0
Shillito's, Cincinnati, Ohio (Federated) (9 stores)	221.1
D. H. Holmes Co., New Orleans, La. (13 stores)	215.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER (continued)

	Sales Volume (Millions of $)
Frederick & Nelson, Seattle, Wash. (Marshall Field) (15 stores)	$ 215.0
Davison's, Atlanta, Ga. (R.H. Macy) (12 stores)	214.0
Hess's, Allentown, Pa. (Crown America Corp.) (24 stores)	211.0
Jordan Marsh-Florida, Miami, Fla. (Allied Stores) (13 stores)	210.0
Higbee's, Cleveland, Ohio (11 stores)	206.3
Dillard Dept. Stores-Texas-New Mexico Div., San Antonio, Tex. (Dillard Dept. Stores, Little Rock, Ark.) (18 stores)	190.0
Elder-Beerman, Dayton, Ohio (23 stores)	190.0
May's, Brooklyn, N.Y. (11 stores)	189.0
L. S. Ayres & Co., Indianapolis, Ind. (Associated Dry Goods) (12 stores)	186.0
Macy's Midwest, Kansas City, Mo. (R. H. Macy) (21 stores)	186.0
Bergner's, Peoria, Ill. (26 stores)	185.0
Thalhimers-Virginia and North Carolina Divs., Richmond, Va. (25 stores)	185.0
Dillard's Little Rock Div., Little Rock, Ark. (Dillard Dept. Stores Inc.) (14 stores)	178.0
Wieboldt Stores, Chicago, Ill. (15 stores)	177.9
Meier & Frank, Portland, Ore. (May Dept. Stores) (7 stores)	175.0
Gimbels-Philadelphia, Philadelphia, Pa. (Batus, Inc.) (10 stores)	170.0
Gimbels Midwest, Milwaukee, Wis. (Batus, Inc.) (11 stores)	170.0
G. Fox, Hartford, Conn. (May Dept. Stores) (8 stores)	170.0
Jacobson Stores, Jackson, Mich. (16 stores)	169.3
Liberty House-Hawaii, Honolulu, Hawaii (6 stores)	166.7
Younker's, Des Moines, Iowa (Equitable of Iowa) (29 stores)	165.0
Joseph Horne, Pittsburgh, Pa. (Associated Dry Goods) (13 stores)	160.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER (continued)

	Sales Volume (Millions of $)
Sibley's, Rochester, N.Y. (Associated Dry Goods) (14 stores)	$ 155.0
Boscov's Department Stores, Reading, Pa. (8 stores)	150.0
Glosser Brothers, Johnstown, Pa. (not incl. Gee Bee Discount Stores)	150.0
Gimbels, Pittsburgh, Pa. (Batus, Inc.) (7 stores)	150.0+
J. Byron's, Miami, Fla. (Jack Eckerd Corp.) (39 stores)	148.9
McAlpin Co., Cincinnati, Ohio (Mercantile Stores) (9 stores)	145.0
Howland Steinbach, White Plains, N.Y. (not incl. Hochschild Kohn) (28 stores)	145.0
Weinstock's, Sacramento, Calif. (Carter Hawley Hale) (12 stores)	144.0
Stix Baer & Fuller, St. Louis, Mo. (Associated Dry Goods) (13 stores)	141.0
Diamond's, Tempe, Ariz. (Dayton Hudson) (13 stores)	140.3
ZCMI, Salt Lake City, Utah (7 stores)	134.2
C. J. Gayfer Co., Mobile, Ala. (Mercantile Stores) (12 stores)	130.0
Liberty House of Calif., Oakland, Calif. (Amfac) (14 stores)	127.0
M. O'Neil Co., Akron, Ohio (May Dept. Stores) (10 stores)	126.0
Goldsmith's, Memphis, Tenn. (Federated) (6 stores)	125.2
Joske's-Houston, Houston, Tex. (Allied Stores) (9 stores)	125.0
The Jones Co., Kansas City, Mo. (Mercantile Stores) (7 stores)	125.0
Rike's, Dayton, Ohio (Federated) (6 stores)	120.9
Stern's, Paramus, N.J. (Allied Stores) (7 stores)	120.0
May-D & F, Denver, Colo. (May Dept. Stores) (9 stores)	120.0
McRae's, Jackson, Miss. (13 stores)	120.0
Denver Dry Goods, Denver, Colorado (Associated Dry Goods) (12 stores)	120.0
Boston Store, Milwaukee, Wis. (Federated) (7 stores)	111.5
Prange's, Green Bay, Wis. (19 stores)	110.0

STORES WITH SALES OF $100 MILLION & OVER (continued)

	Sales Volume (Millions of $)
Miller & Rhoads Inc., Richmond, Va. (Allied Stores) (22 stores)	$ 110.0
Buffum's, Long Beach, Calif. (15 stores)	109.0
Broadway-Southwest Div., Mesa, Ariz. (Carter Hawley Hale) (9 stores)	109.0
Donaldson's, Minneapolis, Minn. (Allied Stores) (9 stores)	107.0
Frost Brothers, San Antonio, Tex. (Manhattan Inds.) (12 stores)	105.0
Joske's-Dallas/Phoenix, Dallas, Tex. (Allied Stores) (12 stores)	105.0
Castner Knott Dry Goods, Nashville, Tenn. (Mercantile Stores) (10 stores)	100.0
Hahne's, Newark, N.J. (Associated Dry Goods) (8 stores)	100.0

STORES WITH SALES VOLUME OF $50 - TO - $99 MILLION

Sales Volume $80-to-$99 Million

Adam, Meldrum & Anderson, Buffalo, N.Y. (9 stores)

B. Gertz Inc., Plainview, N.Y. (Allied Stores) (9 stores)

McCurdy & Co., Rochester, N.Y. (6 stores)

William H. Block & Co., Indianapolis, Ind. (Allied Stores) (9 stores)

J. L. Brandeis & Sons, Omaha, Neb. (10 stores)

Kohl's Department Stores, Brookfield, Wis. (Batus Inc.) (14 stores)

Goudchaux's Inc., Baton Rouge, La. (3 stores)

Ivey's Carolinas, Charlotte, N.C. (J. B. Ivey Co.) (13 stores)

Millers Inc., Knoxville, Tenn. (Allied Stores) (11 stores)

Joske Bros., San Antonio, Tex. (Allied Stores) (8 stores)

Goldwater's, Scottsdale, Ariz. (Assoc. Dry Goods) (8 stores)

E. Gottschalk, Fresno, Calif. (7 stores)

Bullock's-Northern California, Palo Alto, Calif. (Federated) (6 stores)

Joslin Dry Goods, Denver, Colo. (Mercantile Stores) (5 stores)

STORES WITH SALES VOLUME OF $50 - TO - $99 MILLION (continued)

Sales Volume $60-to-$79 Million

D. M. Read Inc., Bridgeport, Conn. (Allied Stores) (5 stores)

The Dry Goods, Aston, Pa. (SCOA Inds.) (4 stores)

Pomeroy's Inc., Levittown, Pa. (Allied) (8 stores)

Crowley Milner & Co., Detroit, Mich. (10 stores)

H. & S. Pogue Co., Cincinnati, Ohio (Associated Dry Goods) (5 stores)

The Lion Dry Goods Co., Toledo, Ohio (Mercantile Stores) (4 stores)

Strouss, Youngstown, Ohio (May Department Stores) (9 stores)

Pizitz Inc., Birmingham, Ala. (12 stores)

Robinson's of Florida, St. Petersburg, Fla. (Associated Dry Goods) (7 stores)

Ivey's Florida, Winter Park, Fla. (Marshall Field) (10 stores)

Stewart Dry Goods, Louisville, Ky. (Associated Dry Goods) (7 stores)

West Bros. Inc., DeRidder, La. (30 stores)

Maison Blanche, New Orleans, La. (City Stores) (8 stores)

Hochschild Kohn Inc., Baltimore, Md. (Supermarkets General) (10 stores)

Hutzler's, Baltimore, Md. (8 stores)

John A. Brown Co., Oklahoma City, Okla. (Dayton Hudson) (6 stores)

Cain-Sloan, Nashville, Tenn. (Allied Stores) (4 stores)

Stone & Thomas, Wheeling, West Va. (14 stores)

Sales Volume $50-to-$59 Million

Albert Steiger Inc., Springfield, Mass. (9 stores)

Pomeroy's Inc., Harrisburg, Pa. (Allied Stores) (6 stores)

S. Grumbacher & Sons, York, Pa. (14 stores)

Gayfers, Montgomery, Ala. (6 stores)

The Fair Inc., Beaumont, Tex. (25 stores)

MAJOR NATIONAL/REGIONAL CHAINS

The following companies have major positions in general merchandise/apparel retailing -- including the operation of traditional department stores, discount stores, apparel specialty stores and catalog operations. Many of these chains are engaged in non-related activities, including the operation of supermarkets or other hard goods outlets, manufacturing, wholesaling or diverse activities, such as the operation of auto repair shops, television stations, etc. The sales volumes reported are total net sales covering all operations unless otherwise noted.

Retail Chain	1981/1982 Sales* (Millions of $)
Alexander's Inc., New York, N.Y. (Sold Margo's La Mode to Elder Beerman in July 1981.) Sales adjusted to fiscal year ending Feb. 1982:	$ 509.7
Allied Stores Corp., New York, N.Y. (Includes $543 million in sales of Garfinckel, Brooks Bros., Miller & Rhoads which was acquired in 1981.)	2,732.1
Ames Department Stores, Inc., Rocky Hill, Conn.	383.1
Amfac, Inc., Honolulu, Hawaii (Liberty House sales: $292.6 million)	2,148.0
C.R. Anthony & Co., Oklahoma City, Okla.	374.2
Associated Dry Goods Corp., New York, N.Y. (Acquired Caldor Inc. in May 1981)	2,751.2
Batus Retail Group, Inc., New York, N.Y.	2,158.4
L.L. Bean, Freeport, Me.	182.0
Belk Stores, Charlotte, N.C.	1,365.2
Bradlees, Braintree, Mass. (The Stop & Shop Companies) (91 stores)	720.0
Brooks Fashion Stores, Inc., New York, N.Y.	179.1
Brown Group Inc., St. Louis, Mo.	1,337.8
Caldor, Norwalk, Conn. (Acquired by Associated Dry Goods in May 1981) (74 stores)	778.0
Carson Pirie Scott & Co., Chicago, Ill. (Department stores division sales: $311.1 million)	769.7
Carter Hawley Hale Stores, Inc., Los Angeles, Calif. (Department store division sales: $2.3 billion)	2,870.7
Charming Shoppes, Inc., Cornwell Hts., Pa.	143.9
City Stores Corp., New York, N.Y.	157.6
Danners, Inc. (Three-D), Indianapolis, Ind.	143.4
Dayton Hudson Corp., Minneapolis, Minn. (Including Mervyn's, Hayward, Calif., which had sales of $1.1 billion, the department store division's sales amounting to $1.3 billion and Target Stores which did about $2.0 billion)	4,942.9
Dillard Department Stores, Inc., Little Rock, Ark. (Including three department store divisions: Central Division, Texas-New Mexico Division, Little Rock Division)	592.9
Dollar General Corp., Scottsville, Ky.	245.5
Duckwall-ALCO Stores Inc., Abilene, Kans.	199.1
Dunlap Co., Fort Worth, Tex.	75.0

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	1981/1982 Sales* (Millions of $)
Edison Bros. Stores, Inc., St. Louis, Mo. (Specialty store division sales: $219 million)	$ 951.4
Elder Beerman Stores Corp., Dayton, Ohio (Department store division: $190.0 million)	235.2
Family Dollar Stores, Inc., Charlotte, N.C.	181.7
Federated Department Stores Inc., Cincinnati, Ohio (Includes Department Store Group's sales of $5.2 billion)	7,067.7
Gap Stores Inc., San Bruno, Calif.	417.4
Gaylords National Corp., Secaucus, N.J.	118.3
Genesco Inc., Nashville, Tenn.	662.5
Glosser Brothers, Inc., Johnstown, Pa.	181.7
HRT Industries Inc., Los Angeles, Calif. (formerly Hartfield-Zody's)	391.1
Heck's Inc., Charleston, W.Va.	473.8
Howland-Steinbach, Hochschild, Kohn, Woodbridge, N.J. (Supermarkets General)	188.3
Interco Inc., St. Louis, Mo. (General merchandise division sales, including P.N. Hirsch: $672.2 million)	2,673.8
Jack Eckerd Corp., Clearwater, Fla. (Including J. Byron's sales, estimated at $148.9 million)	1,752.6
Jacobson Stores Inc., Jackson, Mich.	169.3
Jamesway Corp., Secaucus, N.J.	296.2
K mart Corp., Troy, Mich.	16,527.0
KDT Industries Inc. (formerly Kings Dept. Stores Inc.), Newton, Mass.	741.4
Lane Bryant Inc., New York, N.Y.	419.0
Limited Stores Inc., Columbus, Ohio	364.9
R. H. Macy & Co., Inc., New York, N.Y. (Fiscal year ending Jan. 1982)	2,825.9
Manhattan Industries, Inc., New York, N.Y. (Including Frost Bros. Sales of $104.4 million)	377.8
Marshall Field & Co., Chicago, Ill.	1,194.0
May Department Stores Co., St. Louis, Mo. (Department store group sales: $2.5 billion; Venture Stores, $610 million)	3,401.0
J.M. MacDonald Co., Hastings, Neb.	70.0
Melville Corp., Harrison, N.Y. (including apparel and toy divisions only)	1,060.1
Mercantile Stores Co., Wilmington, Del.	1,269.5
Miller-Wohl Co., Secaucus, N.J.	220.9
Montgomery Ward (Marcor Ind.), Chicago, Ill. (Sales of Jefferson Ward Stores: $553 million)	5,742.0
G. C. Murphy Co., McKeesport, Pa.	817.8
New Process Co., Warren, Pa.	231.3
S.E. Nichols, Inc., New York, N.Y.	231.6
Nordstrom Inc., Seattle, Wash.	522.0

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	1981/1982 Sales* (Millions of $)
Oshman's, Houston, Tex.	$ 216.4
Pamida, Omaha, Neb. (Sales of Paul Harris Stores, $86.3 million)	335.0
J.C. Penney Co., Inc., New York, N.Y.	11,860.0
Petrie Stores Corp., Secaucus, N.J.	529.8
Phillips-Van Heusen Corp., New York, N.Y.	431.1
H.C. Prange Co., Sheboygan, Wis. (PrangeWay Discount Store sales estimated at $125.0 million)	225.2
Rapid-American (Lerner, McCrory and Britts Divs.), New York, N.Y.	1,513.0
Rose's Stores Inc., Henderson, N.C.	594.8
Salkin & Linoff Inc., Minneapolis, Minn.	70.0
SCOA Industries Inc., Columbus, Ohio (Hills Department Stores volume estimated at $790 million)	1,057.6
Sears, Roebuck & Co., Inc., Chicago, Ill. (U.S. merchandising operation only)	18,228.8
Sprouse-Reitz Co., Inc., Portland, Ore.	151.6
Sterling Stores Co., Little Rock, Ark.	130.7
Strawbridge & Clothier, Philadelphia, Pa. (Including sales of Clover Stores, estimated at $143 million)	425.6
Super Valu Stores Inc., Minneapolis, Minn. (Excluding supermarket sales, but including County Seat sales estimated at $180 million)	521.0
Twin Fair, Buffalo, N.Y.	233.0
U.S. Shoe Corp., Cincinnati, Ohio (Including specialty retailing division sales: $457.7 million)	1,088.0
Wal-Mart Stores Inc., Bentonville, Ark.	2,445.0
Winkelman Stores, Inc., Detroit, Mich.	99.8
Winn's Stores Inc., San Antonio, Tex.	134.4
F.W. Woolworth Co., New York, N.Y. (Woolco Div., which had 1981 sales estimated at $2.2 billion, is to be closed)	7,223.0
Younkers, Des Moines, Iowa (Equitable of Iowa Companies, Des Moines)	164.6
Zayre Corp., Framingham, Mass.	1,797.1

*Sales figures for companies which publish this information are for the latest available fiscal year unless otherwise noted. The remainder represent estimates for the year 1981.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

Corporation & Retail Division	Location of Headquarter Office or Headquarter Store
Allied Stores Corporation	New York, N.Y.
Ann Taylor	New York, N.Y.
Block's (William H. Block Co.)	Indianapolis, Ind.
The Bon (Bon Marche)	Seattle, Wash.
Bonwit Teller	New York, N.Y.
Brooks Bros.	New York, N.Y.
Cain-Sloan	Nashville, Tenn.
Catherine's Stout Shoppe (Plus Size)	Memphis Tenn.
Deys	Syracuse, N.Y.
Donaldson's	Minneapolis, Minn.
Field's (L.H. Field Co.)	Jackson, Mich.
Garfinckel's	Washington, D.C.
Gertz (B. Gertz, Inc.)	Bayshore, N.Y.
Harzfelds	Kansas City, Mo.
Heer's	Springfield, Mo.
Herp's-Hardy's	Muskegon, Mich.
Jordan Marsh-New England	Boston, Mass.
Jordan Marsh-Florida	Miami, Fla.
Joske's	Dallas, San Antonio and Houston, Tex.
Levy's	Savannah, Ga.
Maas Brothers	Tampa, Fla.
Miller & Rhoads	Richmond, Va.
Miller's	Knoxville, Tenn.
Muller's	Lake Charles, La.
Plymouth	New York, N.Y.
Pomeroy's	Harrisburg and Levittown, Pa.
Read's	Bridgeport, Conn.
Stern's	Paramus, N.J.
Troutman's (A.E. Troutman Co.)	Greensburg, Pa.
Wren's (Edward Wren Store)	Springfield, Ohio
Almy Stores, Inc.	Brighton, Mass.
Almy's	Brighton, Mass.
Edgar's	Fall River, Mass.
Edwards	Greece and Pittsford, N.Y.
Freese's	Bangor, Maine
Gorin's	Brighton, Mass.
House & Hale	Manchester, Conn.
Star Store	New Bedford, Mass.
R.H. White	Worcester, Mass.
Witherill (L.A. Witherill, Inc.)	Brighton, Mass.
Amfac, Inc.	Honolulu, Hawaii
Liberty House of California	Oakland, California
Liberty House of Hawaii	Honolulu, Hawaii

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Associated Dry Goods	New York, N.Y.
L.S. Ayres & Co.	Indianapolis, Ind.
Caldor, Inc.	Norwalk, Conn.
The Denver Dry Goods Co.	Denver, Colo.
The Diamond	Charleston, West Virginia
Goldwater's	Scottsdale, Ariz.
Hahne & Co.	Newark, N.J.
Joseph Horne Co.	Pittsburgh, Pa.
Lord & Taylor	New York, N.Y.
The H & S Pogue Co.	Cincinnati, Ohio
Powers Dry Goods Co.	Minneapolis, Minn.
J.W. Robinson Co.	Los Angeles, Calif.
Robinson's of Florida	St. Petersburg, Fla.
Sibley, Lindsay & Curr Co. (merged with William Hengerer Co.)	Rochester, N.Y.
Stewart & Co.	Baltimore, Md.
The Stewart Dry Goods Co.	Louisville, Ky.
Stix, Baer & Fuller	St. Louis, Mo.
Sycamore Specialty Stores	Indianapolis, Ind.
Batus, Inc. (Batus Retail Group)	New York, N.Y.
Gimbels Department Stores	New York, N.Y.; Philadelphia and Pittsburgh, Pa.; Milwaukee, Wis.
Kohl's Department Stores	Brookfield, Wis.
Saks Fifth Avenue	New York, N.Y.
Thimbles	Chicago, Ill.
(acquired Marshall Field & Co., Chicago, in 1982)	
Carter Hawley Hale Stores, Inc.	Los Angeles, Calif.
Bergdorf Goodman Co.	New York, N.Y.
The Broadway-Southern California	Los Angeles, Calif.
The Broadway-Southwest	Phoenix, Ariz.
Contempo Casuals	Los Angeles, Calif.
Emporium Capwell	San Francisco, Calif.
Neiman-Marcus	Dallas, Tex.
Thalheimers	Richmond, Va.
John Wanamaker	Philadelphia, Pa.
Weinstock's	Sacramento, Calif.
City Stores Co.	New York, N.Y.
Maison Blanche Co. (6) (sold 5, closed 1 in 1982)	New Orleans, La.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES
OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Cluett, Peabody & Co., Inc.	New York, N.Y.
Boyd's	St. Louis, Mo.
Lytton's	Chicago, Ill.
Dayton Hudson Corp.	Minneapolis, Minn.
John A. Brown	Oklahoma City, Okla.
Dayton's	Minneapolis, Minn.
Diamond's	Phoenix, Ariz.
Hudson's (J.L. Hudson Co.)	Detroit, Mich.
Mervyn's	Hayward, Calif.
Edison Brothers Stores, Inc.	St. Louis, Mo.
Fashion Conspiracy	San Diego, Calif.
Jeans West/Oak Tree	St. Louis, Mo.
Size 5-7-9 Shops	St. Louis, Mo.
The Elder Beerman Stores Corp.	Dayton, Ohio
Margo's La Mode	Dallas, Texas
Federated Department Stores, Inc.	Cincinnati, Ohio
Abraham & Straus	Brooklyn, N.Y.
Bloomingdale's	New York, N.Y.
Boston Store	Milwaukee, Wis.
Bullock's	Los Angeles, Calif.
Bullock's Northern California	Palo Alto, Calif.
Burdine's	Miami, Fla.
Filene's	Boston, Mass.
Foley's	Houston, Tex.
Goldsmith's	Memphis, Tenn.
Lazarus	Columbus, Ohio
Levy's	Tucson, Ariz.
I. Magnin	San Francisco, Calif.
Rich's	Atlanta, Ga.
Sanger-Harris	Dallas, Tex.
Shillito's/Rike's (operation combined in April 1982)	Cincinnati, Ohio
(Merger with The Children's Place, Pine Brook, N.J. was completed in March 1982)	
Genesco, Inc.	Nashville, Tenn.
Baron's	Miami Beach, Fla.
The following were sold during 1981:	
Burkhardt's	Cincinnati, Ohio
M. Gilbert & Sons	uth Bend, Ind.
Graves, Cox & Co., Inc.	Lexington, Ky.
Hall-Brown	Nashville, Tenn.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS (continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Hart-Schaffner & Marx	Chicago, Ill.
J.P. Allen	Atlanta, Ga.
Baskin Clothing Co.	Chicago, Ill.
Ray Beers	Topeka, Kansas
Blackburn's	Amarillo, Tex.
Capper & Capper, Ltd.	Detroit, Mich. and Chicago, Ill.
Country Miss Stores	New York, N.Y.
deJong's	Evansille, Ind.
Field Brothers	New York, N.Y.
Arthur Frank	Salt Lake City, Utah
Frank Bros.	San Antonio, Tex.
Hanny's	Phoenix, Ariz.
Hasting's	San Francisco, Calif.
Jack Henry	Kansas City, Mo.
Heyward-Mahon	Greenville, S.C.
J.O. Jones	Charlotte, N.C.
Kleinhans	Buffalo, N.Y.
Klopfenstein's	Seattle, Wash.
Kuppenheimer Mfg. Co. (40 factory outlets acquired December 1982)	Atlanta, Ga.
Leopold Price & Rolle	Houston, Tex.
Levy/Wolf	Jacksonville, Fla.
Liemandt's	Minneapolis, Minn.
Littler's	Seattle, Wash.
Merritt Schaefer & Brown	Austin, Tex.
Porter-Stevens	New Orleans, La.
Root's	Summit, N.J.
Shulman's	Norfolk, Va.
Silverwoods	Los Angeles, Calif., Las Vegas, Nev.
Stevens	Jackson, Miss.
Chas. A. Stevens	Chicago, Ill.
F.R. Tripler & Co.	New York, N.Y.
Walkers	Columbus and Dayton, Ohio
Wallachs	New York, N.Y.
Wallachs of Florida	Miami, Fla.
Wicks & Greenman	Utica, N.Y.
Jas. K. Wilson	Dallas, Tex.
Wolf Bros.	Tampa, Fla.
Wolff's	St. Louis, Mo.
Zachry	Atlanta, Ga.
Interco, Incorporated	St. Louis, Mo.
Alberts	Detroit, Mich.
Fine's Men's Shops, Inc.	Norfolk, Va.
Golde's Department Stores	St. Louis, Mo.
P.N. Hirsch	St. Louis, Mo.
Standard Sportswear, Inc.	Pittsburgh, Pa.
United Shirt Distributors, Inc.	Detroit, Mich.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
R.H. Macy & Co., Inc.	New York, N.Y.
Bamberger's	Newark, N.J.
Davison's	Atlanta, Ga.
Macy's California	San Francisco, Calif.
Macy's Midwest	Kansas City, Mo.
Macy's New York	New York, N.Y.
Manhattan Industries, Inc.	New York, N.Y.
Brand Name Fashion Outlet	Glen Rock, N.J.
Frost Brothers, Inc.	San Antonio, Tex.
Manhattan Ward, Inc.	Conshohocken, Pa.
Marshall Field & Co., Inc. (acquired by Batus, Inc. in 1982)	Chicago, Ill.
The Crescent	Spokane, Wash.
Marshall Field & Co.	Chicago, Ill.
Frederick & Nelson	Seattle, Wash.
J.B. Ivey & Co.	Charlotte, N.C.
The May Department Stores Co.	St. Louis, Mo.
Famous Barr Co.	St. Louis, Mo.
G. Fox & Co.	Hartford, Conn.
The Hecht Co.	Washington, D.C. and Baltimore, Md.
Kaufmann's	Pittsburgh, Pa.
May-Cohens	Jacksonville, Fla.
The May Co.	Cleveland, Ohio
May Co. California	Los Angeles and San Diego, Calif.
May-D & F	Denver, Colo.
Meier & Frank Co.	Portland, Ore.
The M. O'Neil Co.	Akron, Ohio
Strouss	Youngstown, Ohio
Melville Corp.	Harrison, N.Y.
Chess King	Worcester, Mass.
Foxmoor	West Bridgewater, Mass.
Marshall, Inc.	Woburn, Mass.
Mercantile Stores Co., Inc.	Wilmington, Del.
Bacon's	Louisville, Ky.
Castner-Knott Co.	Nashville, Tenn.
de Landrecies	Fargo, N.D.
Gayfer's	Montgomery, Ala.
Glass Block	Duluth, Minn.
Hennessey's	Billings, Mont.
The Jones Store Co.	Kansas City, Mo.

(continued)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Mercantile Stores Co., Inc. (continued)	
Joslin's (Joslin's Dry Goods Co.)	Denver, Colo.
Lion	Toledo, Ohio
McAlpin's	Cincinnati, Ohio & Lexington, Ky.
The People's Store	Tacoma, Wash.
Root's	Terre Haute, Ind.
J.B. White	Augusta, Ga.; Columbia and Greenville, S.C.
Petrie Stores Corp.	Secaucus, N.J.
David's	Secaucus, N.J.
Franklin's	Secaucus, N.J
G & G Shops	New York, N.Y.
Hartfield's	Secaucus, N.J.
Marianne	Secaucus, N.J.
Petrie's	Secaucus, N.J.
Stuarts	Secaucus, N.J.
Phillips-Van Heusen Corp.	New York, N.Y.
Hamburger's	Baltimore, Md.
Harris & Frank	Los Angeles, Calif.
Juster's	Minneapolis, Minn.
Kennedy's	Boston, Mass.
Rices Nachmans	Norfolk, Va.
Rapid-American Corp.	New York, N.Y.
Britts Dept. Store Division	New York, N.Y.
Lerner Stores Corp.	New York, N.Y.
McCrory Stores Division	New York, N.Y.
Supermarkets General Corp.	Woodbridge, N.J.
Hochschild, Kohn & Co.	Baltimore, Md.
Howland-Steinbach	White Plains, N.Y.; Asbury Park, N.J.
U.S. Shoe Corp.	Cincinnati, Ohio
Antics/Ups 'N Downs	Enfield, Conn.
August Max	New York, N.Y.
Caren Charles	Enfield, Conn.
Casual Corner	Enfield, Conn.
T.H. Mandy	Merrfield, Va.
The Proving Ground	Enfield, Conn.
J. Riggings	Atlanta, Ga.
Wickes Companies, Inc.	San Diego, Calif.
Alden's, Inc.	Chicago, Ill.
Gamble Department Stores, Inc.	Chicago, Ill.
Howard Brothers	Monroe, La.
J.M. McDonald (McDonald Dept. Stores)	Hastings, Neb.
Mode O'Day	Burbank, Calif.
Women's World Shops	La Mesa, Calif.

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in January, 1983): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DRESSES (WOMEN'S, MISSES' AND JUNIORS') (January, 1983): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manutacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Dresses (Women's, Misses' and Juniors')

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TABLE OF CONTENTS

Page

AT THE MANUFACTURER LEVEL:

- MARKET TRENDS.......... 1
- GENERAL STATISTICS ON THE INDUSTRY.......... 1
  - EMPLOYMENT & EARNINGS.......... 3
  - OPERATING RATIOS.......... 4
  - BY REGIONAL LOCATIONS.......... 5
- PRODUCTION.......... 6
  - MATERIALS CONSUMED.......... 7
  - SEASONALITY IN PRODUCTION.......... 8
- SHIPMENTS.......... 8
- PRODUCER PRICE TRENDS.......... 11
- FOREIGN TRADE--IMPORTS.......... 11
- FOREIGN TRADE--EXPORTS.......... 13

AT THE RETAIL LEVEL:

- THE POTENTIAL MARKET.......... 14
  - WORKING WOMEN.......... 16
  - SPECIALIZED MARKETS.......... 18
- RETAIL SALES.......... 19
- RETAIL SALES BY TYPE OF OUTLET.......... 20
  - SPECIALTY STORES.......... 20
  - DEPARTMENT STORES.......... 22
- RETAIL ADVERTISING.......... 24
- CONSUMER PRICE TRENDS.......... 24
- CONSUMER BUYING HABITS.......... 24

SCHEDULE OF ADDITIONAL FACT FILES.......... 28

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E. B. Gold, Manager
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WOMEN'S, MISSES' & JUNIORS' DRESSES

Market Trends

Dress sales in 1982, according to a consensus of trade sources, ran even or slightly ahead of 1981 sales. Many industry observers feel that this showing, in a generally flat apparel sales year, may signal an upturn in the fortunes of the dress industry.

A 1981 survey found that 20% of women nationwide were actively shopping for a dress, while an additional 79% reported that they were waiting for a dress sale. The surge in the number of working women is one of the major reasons for the optimism of dress manufacturers. Over 47 million women were in the civilian labor force in 1982, with over 28 million employed in white-collar occupations.

Many of the best-selling dress categories in 1982 can be traced to the working women influence. For example, knit dresses, a category which had been dormant since the mid-1970's, showed renewed life. Consumer interest was attributed, in part, to the easy-care properties of knits--a key selling point to the working women with limited time. Contemporary dresses, described as reasonably priced, work-oriented apparel, also sold well in 1982.

Overall, the dress business in 1982 was brisk in the better and upper moderate price points but relatively static in the strictly traditional, moderately-priced area. What seems to excite today's consumer is new looks and fabrics. Styling has become all-important to dress manufacturers. The makers who have captured the public's imagination with their designs have registered sharp sales increases in spite of the recession. From this, the manufacturers conclude that women are willing to buy dresses but want to see something new to entice them.

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

The estimated value of industry shipments (including both primary and secondary products and miscellaneous receipts) from all manufacturers classified in the women's and misses' dress industry in 1981, as reported in the 1982 U.S. Industrial Outlook, was $4.5 billion. This figure was 1.5% higher than the estimated 1980 shipment value of $4.4 billion and only 6.7% larger than the shipment value of $4.2 billion in 1977. Measured in constant 1972 dollars, the value of dress industry shipments has fallen at the compounded annual rate of 1.7% since 1972, according to the Bureau of Industrial Economics.

GENERAL STATISTICS ON THE INDUSTRY

Women's, Misses' & Juniors' Dress Industry (SIC 2335*)

	1981(e)	1980	1979	1978	1977
Number of companies	na	na	na	na	6,753
Number of establishments, total**	na	4,038#	4,198#	3,466#	6,953
Employees, total (thous.)	143.1	176.3	162.8	159.8	175.3
Production workers (thous.)	120.6	152.0	139.8	137.7	153.0
Payroll (mil. $)	na	$1,359.8	$1,218.2	$1,178.4	$1,197.1
Value added by manufacture (mil. $) ***	$2,392.0	$2,472.5	$2,256.0	$2,330.9	$2,233.7
Value of industry shipments (mil. $) ##	$4,471.0	$4,405.6	$4,081.5	$4,371.4	$4,188.6
Capital expenditures, new (mil. $)	na	$ 50.5	$ 38.5	$ 38.1	$ 45.2

*SIC (Standard Industrial Classification) 2335 covers establishments primarily engaged in manufacturing women's, misses', and juniors' dresses of all types, including ensemble dresses and pants dresses, whether sold by the unit or by the dozen (daytime house dresses).

**Each business location is counted as a separate establishment. For 1977, the 6,953 establishments in the dress industry included 4,347 manufacturers (regular or inside factory), 462 jobbers (who arrange with contractors to manufacture for them, the jobber supplying the material), 2,144 contractors (outside factories which process materials owned by others, and do not sell the finished garment).

***Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

#Covers establishments with paid employees only, as reported in County Business Patterns.

##Value of shipments of the dress industry includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in this industry. Figures on shipments of dresses by all producers, including those classified in other industries, are shown on page 9.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Annual Survey of Manufactures, 1979, 1980
County Business Patterns, 1978, 1979,
U.S. Industrial Outlook, 1982

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

An average of 128.2 thousand people were employed in the women's and misses' dress industry over the January to September 1982 period, a 7.5% decrease from the average of 138.6 thousand persons in the same 1981 period. Over the same time frame, the number of production workers dropped 8.7% to 111.6 thousand.

After a 10.9% rise in average weekly earnings in 1981 compared with 1980, the growth of production worker wages slowed to a moderate 2.9% increase in the first nine months of 1982 compared with the same 1981 period.

Employment & Earnings in the Dress Industry

	January-September Average			Annual Average		
	1982(p)	1981	% Change 1982/1981	1981	1980	% Change 1981/1980
Women's & misses' dresses (SIC 2335)						
All employees (thous.)	128.2	138.6	- 7.5%	137.1	144.3	- 5.0%
Production workers (thous.)	111.6	122.2	- 8.7	120.7	128.0	- 5.7
Avg. weekly earnings	$168.48	$163.79	+ 2.9	$164.59	$148.37	+ 10.9
Avg. hourly earnings	5.24	5.06	+ 3.6	5.08	4.71	+ 7.9
Avg. weekly hours	32.2	32.4	- 0.6	32.4	31.5	+ 2.9

(p) = preliminary.

Source: U.S. Bureau of Labor Statistics, Employment and Earnings.

In 1980, there were a total of 4,038 establishments with payrolls primarily manufacturing dresses in the U.S., according to the Census Bureau's County Business Patterns report. Nearly 80% of these establishments employed fewer than 50 people while only 6.4% were relatively large plants with 100 persons or more.

The Women's Dress Industry by Employment Size, 1980

	Establishments	
	Number	% of Total
Women's & misses' dresses (SIC 2335)	4,038	100.0%
By establishment size:		
Under 10 employees	1,065	26.4
10-19 employees	808	20.0
20-49 employees	1,341	33.2
50-99 employees	565	14.0
100 or more employees	259	6.4

Source: U.S. Bureau of the Census, County Business Patterns, 1980.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment & Share of Industry Shipments in Large Plants In the Women's & Misses' Dress Industry, 1981

	Number of Plants		% of Industry Shipments Accounted for by Plants With 100 or More Employees
	With 20+ Employees	With 100+ Employees	
Women's & misses' dresses (SIC 2335)	1,203	342	63%

Source: Sales & Marketing Management,
"Survey of Industrial Purchasing Power,"
April 1982. All rights reserved.

Operating Ratios

The 50 largest companies engaged in the manufacture of women's and misses' dresses in 1977 accounted for 26% of the $4.1 billion worth of dresses shipped by all U.S. manufacturers that year. In 1977, the total shipment value of unit-priced dresses reached $2.0 billion, 9.3% higher than in 1972. The top 50 manufacturers shipped 44% of the 1977 total.

Concentration Ratios in the Women's & Misses' Dress Industry & the Washable Service Apparel Industry, 1972, 1977

	Value of Shipments* (Mil. $)	Percent Accounted For By:			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Women's & misses' dresses					
1977	$ 4,132.8	7%	10%	17%	26%
1972	3,536.2	9	13	18	27
Unit-priced dresses					
1977	1,997.7	10	17	30	44
1972	1,827.7	14	20	29	44
Dozen-priced dresses					
1977	399.1	27	40	63	86
1972	378.2	21	30	49	76
Washable service apparel					
1977	193.2	33	51	82	99
1972	105.2	36	55	82	99

* Value of shipments from all producers, regardless of industry classification.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing
MC77-SR-9.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Specified Business Ratios in the Women's Dress Industry, 1980
(Median Results)

	Women's & Misses' Dresses (SIC 2335)
Number of firms reporting	497
Current assets to current debt (times)	1.71
Net profit on net sales (percent)	2.27
Net profits on net worth (percent)	21.79
Net sales to net worth (times)	8.34
Net sales to inventory (times)	11.5
Collection period (days)	41

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
Key Business Ratios 1980,
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By Regional Location

Leading States in the Women's & Misses' Dress Industry, 1977

	Number of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	20+ Employees		
Women's & misses' dresses, (SIC 2335), U.S. total	6,953	2,473	$ 2,233.7	$ 4,188.6
Leading States:				
New York	2,450	957	837.3	1,792.1
California	1,831	356	369.7	710.7
Pennsylvania	535	365	231.4	337.7
Florida	520	129	101.2	164.6
New Jersey	380	142	102.2	183.8
Texas	200	76	97.9	184.8
Massachusetts	141	79	81.3	144.9
Illinois	73	36	60.9	147.1
Leading states, total	6,130	2,140	1,881.9	3,665.7
Percent of U.S. total	88.2%	86.5%	84.2%	87.5%

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23B.

PRODUCTION

Based on production statistics compiled by the International Ladies' Garment Workers' Union (ILGWU), which includes adjustment for underreporting in U.S. Bureau of Census data, U.S. dress production in 1981 dropped to about half of what it was in 1966. Compared with 1980, dress production in 1981 fell 24.4%.

Trend in U.S. Production of Dresses, 1975-1981
(Index, 1966 = 100)

Year	Index
1975	69.3
1976	66.4
1977	71.1
1978	69.8
1979	67.5
1980	66.0
1981	49.9

Source: Based on reports from the U.S. Bureau of the Census and the ILGWU Research Department.

Annual data on production of major categories of women's wear, based on a sample of manufacturers and jobbers, are compiled in the Current Industrial Reports series issued by the U.S. Bureau of the Census.

Starting with the 1981 annual CIR on women's and children's outerwear, the Census Bureau added a number of manufacturers to the survey. Although their output is included in the 1981 production totals, these firms were not asked to supply data for any previous years. In 1981, the newly-added firms accounted for 12.6% of the reported production of women's dresses and 12.8% of washable service apparel production.

Adjusting the data for comparability with the prior year, 1981 dress production was down a steep 17.8% while the output of washable service apparel declined 5.5%. Comparisons between 1981 and 1980 in terms of wholesale price, fabric type or construction cannot be made due to the difference in coverage.

Production of Women's, Misses' & Juniors' Dresses
& Washable Service Apparel, 1981
(Thousands of Units)

	1981	% Change 1981/1980 (Adjusted)
Women's, misses' & juniors' dresses	165,306	- 17.8%
Washable service apparel	2,728	- 5.5

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's and Children's Outerwear, 1981

PRODUCTION

U.S. Production of Dresses & Washable Service Apparel by Fabric Construction & Factory (Wholesale) Prices of Dresses, 1981

	Production (Thous. Units) 1981	% of Total
Women's, misses' & juniors' dresses	165,306	100.0%
By price (per unit):		
Under $6.00	9,250	5.6
$6.00 - 9.99	28,806	17.4
$10.00 - 15.99	45,236	27.4
$16.00 & over	50,338	30.4
Price line, n.s.k.	31,676	19.2
By fabric:		
Woven fabric:		
All or chiefly cotton	14,799	8.9
All or chiefly man-made	71,419	43.2
All or chiefly wool	2,094	1.3
All other fabric	2,869	1.7
Knit fabric:		
All or chiefly cotton	2,964	1.8
All or chiefly man-made	37,624	22.8
All or chiefly wool	820	0.5
All other fabrics	123	*
Fabric, n.s.k.	32,594	19.7
Washable service apparel, including uniforms, medical & lab jackets, etc.	2,728	100.0
By construction:		
Woven fabric	1,076	39.4
Knit fabric	998	36.6
Construction, n.s.k.	654	24.0
By fabric:		
All or chiefly cotton	277	10.1
All or chiefly man-made	1,886	69.1
All other fabrics, including fabric, n.s.k.	565	20.7

n.s.k. = not specified by kind.

* Less than 0.1%.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's and Children's Outerwear, 1981.

Materials Consumed

The 1977 census of manufactures reports included information on the delivered cost of fabrics consumed in the production of dresses by plants classified in this industry, as noted below:

(continued)

PRODUCTION

Materials Consumed

Value of Fabrics Used in Dress Production, 1972, 1977
(Delivered Cost in Millions of Dollars)

	1977	1972	% Change 1977/1972
Broad woven fabrics	$331.0	$289.5	+ 14.3%
Purchased knitted fabrics	222.3	427.1	- 47.9%

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series MC77-1-23B.

Seasonality in Production

In both 1980 and 1981, dress cuttings were highest in March and lowest in December, according to the monthly CIR on women's, misses' and juniors' apparel. The monthly report was discontinued at the end of 1981 due to budget restraints.

Percent of Year's Cuttings of Dresses by Months, 1980, 1981

	1981	1980
Total dress cuttings	100.0%	100.0%
By month		
January	8.3	9.5
February	9.6	10.4
March	11.1	10.8
April	10.0	10.3
May	8.8	8.8
June	8.9	9.2
July	7.5	7.7
August	8.4	7.8
September	8.2	7.1
October	7.3	7.1
November	6.0	5.8
December	5.9	5.5

Source: U.S. Bureau of the Census, Women's, Misses' & Juniors' Apparel, December 1981.

SHIPMENTS

The Annual Survey of Manufactures (ASM) reports issued by the Census Bureau are based on a sample of manufacturers, jobbers and contractors of women's wear and thus provides broader-based information on the value of dress shipments than the Current Industrial Reports series. Differences in the two series also occur due to variations in product classifications and reporting procedures. However, in both the ASM and the CIR the year-to-year trend is considered by the Census Bureau to be more significant than the level of reporting.

For 1981, the Current Industrial Reports series reported that the total shipment value of women's, misses' & juniors' dresses was down 3.8% compared with 1980. Over the same time frame, the shipment value of washable service apparel gained a slight 0.8% in value.

Contract work on women's, misses' & juniors' dresses, not reported in the CIR, totaled $970.2 million in 1980, 8.2% higher than in 1979, according to the ASM report. Overall, dress shipments surpassed $4.2 billion in 1980, a gain of 8.9% over the previous year. Unit-priced dress shipments rose 4.3% in value to almost $2.5 billion in 1981.

Value of Shipments of Dresses & Washable Service Apparel, 1979, 1980

	Value of Shipments (Mil. $)		
	1980	1979	% Change 1980/1979
Women's, misses' & juniors' dresses	$ 4,277.9	$ 3,926.8	+ 8.9%
Unit-price dresses	2,464.1	2,363.2	+ 4.3
Dozen-price dresses	357.3	334.3	+ 6.9
Contract work on women's, misses' & juniors' dresses	970.2	896.7	+ 8.2
Women's, misses' & juniors' dresses, n.s.k.	486.3	332.5	+ 46.3
Women's, misses' & juniors' washable service apparel	205.8	216.8	- 5.1

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures,
Value of Product Shipments
M80(AS)-2.

By Region

Manufacturers of dresses in 4 states--New York, California, Pennsylvania and Texas--accounted for 83.7% of the $2.0 billion worth of unit-priced dresses shipped by U.S. manufacturers in 1977. More than half of the shipments (value) of unit-priced dresses came from New York State plants.

SHIPMENTS

By Region

Value of Shipments of Dresses & Washable Service Apparel By Leading States, 1977

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Women's, misses' & juniors' dresses			
Unit-priced			
U.S. total	$ 1,997.7	$ 1,827.7	+ 9.3%
Leading states:			
New York	1,101.7	910.7	+ 21.0
California	323.4	238.1	+ 35.8
Pennsylvania	134.5	nr	--
Texas	112.9	72.8	+ 55.1
Leading states, total	1,672.5	--	--
Percent of U.S. total	83.7%	--	
Dozen-priced			
U.S. total	399.1	378.2	+ 5.5
Leading states:			
New York	106.2	140.0	- 24.1
Illinois	103.2	48.6	+112.3
California	43.7	nr	--
Leading states, total	253.1	--	--
Percent of U.S. total	63.4%	--	
Contract work on women's, misses' & juniors' dresses, U.S. total	694.5	729.7	- 4.8
Leading states:			
New York	184.6	211.3	- 12.6
Pennsylvania	131.2	153.5	- 14.5
California	66.0	43.6	+ 51.4
New Jersey	45.8	48.2	- 5.0
Florida	35.2	26.5	+ 32.8
Massachusetts	33.5	37.9	- 11.6
Leading states, total	496.3	521.0	- 4.7
Percent of U.S. total	71.5%	71.4%	
Women's, misses' & juniors' washable service apparel, U.S. total	193.2	105.2	+ 83.6
Leading states:			
New York	53.3	28.7	+ 85.7
California	22.8	nr	--
Georgia	22.1	14.1	+ 56.7
Missouri	20.0	nr	--
Tennessee	12.5	nr	--
Leading states, total	130.7	--	--
Percent of U.S. total	67.6	--	

nr = not reported.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-I-23B.

PRODUCER PRICE TRENDS

After a rise of 5.9% for the year 1981 compared with the prior year, producer (or factory) prices for women's unit-priced dresses increased only 2.3% in the January-September 1982 period as against the 1981 average. At the same time, the producer price index for all women's apparel jumped 9.3% in 1981 over 1980 and 4.4% in 1982's first nine months. Price rises of all commodities covered in the Bureau of Labor Statistics slowed to 1.9% over the first three quarters of 1982, after a 9.1% increase in 1981 compared with 1980.

Producer Price Index of Women's Dresses, 1980, 1981
& January-September 1982 Average
(1967=100 unless otherwise indicated)

	January-September 1982	Annual Averages		% Change January-September 1982/ Annual Average 1981
		1981	1980	
All commodities	299.0	293.4	268.8	+ 1.9%
Women's apparel	171.7	164.4	150.4	+ 4.4
Unit-priced dresses (Dec. 1977=100)	124.1	121.3	114.5	+ 2.3

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

Imported women's and children's dresses were valued at $217.9 million in 1981, up 9.6% over 1980. Of this total, only 25.1%, or $54.7 million, were knit dresses. Dresses of man-made fibers (not knit) represented the largest single category of dress imports. In 1981, these imports were valued at $53.1 million, 34.6% higher than in 1980, while the quantity shipped rose 16.7% to 916.7 thousand dozen. Cotton dresses (not knit) gained 25% in value to $50.4 million on a 26.3% increase in units to 684.5 thousand dozen.

According to the Bureau of Industrial Economics in the 1982 U.S. Industrial Outlook, the value of women's and misses' dress imports reached an estimated $198.1 million in 1981, 30.4% higher than the year before. These imports represented approximately 6.9% of U.S. apparent consumption (domestic shipments plus imports minus exports) of dresses in 1981.

Imports

Imports of Women's & Children's Dresses By Leading Countries of Origin, 1980, 1981

(Quantity in thousands of dozens, except where noted)

	Quantity			C.I.F. Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Women's, girls' & infants' dresses, total	na	na	--	$217,877	$198,728	+ 9.6%
Not knit, total	1,743.7	1,430.4	+ 21.9%	163,198	150,500	+ 8.4
Cotton	684.5	541.9	+ 26.3	50,419	40,342	+ 25.0
India	259.3	201.8	+ 28.5	21,675	16,100	+ 34.6
Philippines	72.3	71.0	+ 1.8	1,861	1,910	- 2.6
Pakistan	56.6	33.3	+ 70.0	2,288	1,409	+ 62.4
Wool, not ornamented	5.9	7.3	- 19.2	3,196	2,881	+ 10.9
Hong Kong	2.7	1.7	+ 58.8	885	460	+ 92.4
France	0.9	1.1	- 18.2	794	920	- 13.7
Man-made fibers	916.7	785.2	+ 16.7	53,099	39,455	+ 34.6
Philippines	386.1	367.8	+ 5.0	8,334	6,880	+ 21.1
Hong Kong	104.5	72.6	+ 43.9	14,991	10,661	+ 40.6
Taiwan	77.7	37.8	+105.6	6,102	2,972	+105.3
Silk	136.6	96.0	+ 42.3	56,484	33,911	+ 66.6
Hong Kong	72.2	61.0	+ 18.4	25,887	18,270	+ 41.7
Korea	54.9	26.6	+106.4	19,116	8,156	+134.4
Knit, total	na	na	--	54,679	48,228	+ 13.4
Cotton	94.2	156.5	- 39.8	8,196	10,554	- 22.3
Hong Kong	37.3	84.8	- 56.0	3,759	5,686	- 33.9
Japan	13.0	5.7	+128.1	976	363	+168.9
Wool (quantity in thousands of pounds)	841.3	755.0	+ 11.4	18,267	13,772	+ 32.6
Hong Kong	669.5	676.9	- 1.1	14,157	10,511	+ 34.7
Man-made fibers	401.0	377.8	+ 6.1	28,216	23,902	+ 18.0
Taiwan	193.9	174.3	+ 11.2	12,935	9,491	+ 36.3
Hong Kong	100.9	61.8	+ 63.3	9,030	5,638	+ 60.2

na = not available

* The C.I.F. value (cost, insurance, freight) refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports FT 135,
December 1980, 1981.

FOREIGN TRADE

Exports

In 1981, a total of 1,622 thousand dozen women's and children's dresses valued at $62.8 million were exported by U.S. manufacturers. Compared with 1980 dress exports, the 1981 value was 22.2% higher on a 6.9% increase in the quantity.

The U.S. Bureau of the Census separates women's dress exports from children's dresses only when they are made of either cotton or man-made fibers. Women's dresses made of these materials were valued at $53.7 million in 1981, a 15.4% jump from the previous year, although the number exported rose only slightly (1.4%) to 1,448 thousand dozen.

Women's and misses' dress exports represented about 2.4% of the U.S. dress shipments in 1981, according to the Bureau of Industrial Economics.

Quantity & Value of Exports of Women's Dresses By Leading Countries of Destination, 1980, 1981

	Quantity (Thous. Doz.)			Value* (Thous.$)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Dresses, total	1,621.9	1,517.6	+ 6.9%	$62,831	$51,426	+ 22.2%
Not knit, total	961.7	1,091.1	- 11.9	41,889	33,534	+ 24.9
Knit, total	660.2	426.5	+ 54.8	20,942	17,892	+ 17.0
Women's dresses, total	1,447.8	1,427.5	+ 1.4	53,742	46,579	+ 15.4
Not knit	842.3	1,018.3	- 17.3	36,840	30,572	+ 20.5
Cotton	123.9	124.7	- 0.6	6,874	5,821	+ 18.1
Mexico	37.9	34.1	+ 11.1	2,103	1,663	+ 26.5
Man-made fibers	718.4	893.6	- 19.6	29,966	24,751	+ 21.1
Canada	228.6	155.7	+ 46.8	5,906	4,459	+ 32.4
Mexico	131.5	428.7	- 69.3	7,312	6,378	+ 14.6
Knit, total	605.5	409.2	+ 48.0	16,902	16,007	+ 5.6
Cotton	87.9	156.8	- 43.9	5,074	7,917	- 35.9
Netherlands Antilles	22.3	41.9	- 46.8	1,617	2,379	- 32.0
Mexico	17.7	37.4	- 52.7	654	1,003	- 34.8
Man-made fibers	517.6	252.4	+105.1	11,828	8,090	+ 46.2
Mexico	376.2	98.4	+282.3	6,223	2,645	+135.3

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Women's Dresses By Leading Countries of Destination, 1980, 1981 (continued)

	Quantity (Thous. Doz.)			Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Women's, girls' & infants' dresses, total	174.1	90.1	+ 93.2	$9,089	$4,847	+ 87.5%
Not knit, total	119.4	72.8	+ 64.0	5,049	2,962	+ 70.5
Wool	12.7	16.7	- 23.9	1,083	956	+ 13.3
Mexico	4.5	1.5	+200.0	421	173	+143.3
Other materials, excluding cotton, man-made & wool	106.7	56.1	+ 90.2	3,966	2,006	+ 97.7
Haiti	36.7	10.7	+243.0	640	145	+341.4
Knit, total	54.7	17.3	+216.2	4,040	1,885	+114.3
Wool	20.1	3.8	+428.9	2,049	470	+336.0
Netherlands Antilles	10.1	1.4	+621.4	912	178	+412.4
Other materials, excluding cotton, man-made & wool	34.6	13.5	+156.3	1,991	1,415	+ 40.7
Venezuela	9.4	0.9	+944.4	551	126	+337.3

*The export value is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the carrier and also excludes freight, insurance and other charges incurred beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1980, 1981.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

By 1995, according to population projections made by the U.S. Bureau of the Census, there will be approximately 21.1 million women between the ages of 35 and 44, 56% more than in 1981. In 1995, the women in this age bracket will account for 15.8% of all females compared with only 11.5% in 1981.

Another age bracket which is expected to grow at a substantially faster rate than the overall total is women 65 years and older. They will represent 15.4% of the projected total of 133.3 million women in 1995 and, at 20.6 million, is expected to grow 31.2% from 15.7 million in 1981. The Census Bureau expects the number of women of all ages will rise 13.1% during this 14-year time frame.

The median age of women in the population is expected to gradually increase to 36 in 1995 compared with 34.3 years old in 1990 and 31.6 years old in 1981.

THE POTENTIAL MARKET

Female Population of the U.S., 1981 & Projections to 1995*
(In Millions)

	1981	1985	1990	1995	Percent of Female Population 1981	 1985	 1995
Total, all ages	117.9	122.5	128.2	133.3	100.0%	100.0%	100.0%
Under 15 years	25.0	25.3	26.6	27.7	21.2	20.7	20.8
15 years & older	92.9	97.2	101.6	105.6	78.8	79.3	79.2
15-19 years	10.0	9.0	8.3	8.3	8.5	7.3	6.2
20-24 years	10.8	10.5	9.1	8.4	9.2	8.6	6.3
25-34 years	19.6	20.9	21.6	20.1	16.6	17.1	15.1
35-44 years	13.5	16.2	19.1	21.1	11.5	13.2	15.8
45-54 years	11.6	11.6	13.1	16.1	9.8	9.5	12.1
55-64 years	11.7	11.8	11.2	11.1	9.9	9.6	8.3
65 years & over	15.7	17.2	19.1	20.6	13.3	14.0	15.4
Median age	31.6	32.8	34.3	36.0			

* These are middle-level projections, which assume a fertility rate of 1.9 births per woman, as well as middle-level mortality and immigration rates.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25 Nos. 914,922

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Some 14 million women in the U.S. population are likely candidates for petite sizes, while another eight million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships. While there are 47 million women in the U.S. who are five feet three inches or shorter most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

Estimated Number of Women 18 Years of Age & Over By Height & Weight, 1982
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	86,063	100.0%	19,537	22.7%	38,251	44.4%	28,251	32.9%
Height:								
5'3" or less	46,991	54.6	14,114	16.4	19,622	22.8	13,254	15.4
5'4" - 5'6"	31,068	36.1	4,992	5.8	14,630	17.0	11,446	13.3
5'7" or more	8,004	9.3	430	0.5	3,959	4.6	3,615	4.2

Source: Fairchild Market Research Department based on National Health Survey (U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census population projections for 1982 by age.

THE POTENTIAL MARKET

Working Women

More than half (52.1%) of the 89.6 million women in the U.S. aged 16 and older were working or actively seeking employment in 1981. The percentage of working women was even higher among women householders with no husband present (60%). Slightly more than half (50.5%) of women with working husbands also were in the labor force, compared with 40.5% in 1970.

In contrast with 1970, when only 45% of females aged 25-34 were members of the work force, by 1981 two-thirds (66.7%) of the women in this age bracket had joined the work force. The percentage of women aged 35-44 either employed or looking for a job in 1981 jumped to 66.8% compared with 51.1% in 1970. Women between the ages of 20 and 24 had the highest labor force participation rate in both 1970 and 1981, 57.7% and 69.6%, respectively.

Participation rates for women over age 55 declined in 1981 versus 1970. In 1981, 41.4% of females aged 55-64 were members of the labor force, less than the 43.0% rate in 1970.

Number of Women Employed in Civilian Labor Force & Participation Rates By Specified Age Groups, 1970, 1981

	1981		1970	
	Number Employed (Mil.)	% of Total	Number Employed (Mil.)	% of Total
Females, 16 years & older	46.7	52.1%	31.5	43.3%
By age group:				
16 & 17 years	1.7	42.5	1.3	34.9
18 & 19 years	2.5	60.9	1.9	53.6
20-24 years	7.4	69.6	4.9	57.7
25-34 years	12.9	66.7	5.7	45.0
35-44 years	9.0	66.8	6.0	51.1
45-54 years	7.1	61.1	6.5	54.4
55-64 years	4.8	41.4	4.1	43.0
65 years & older	1.2	8.0	1.1	9.7
Family householder, no husband present	5.6	60.0	2.3	52.3
Wife of householder	24.8	50.5	18.0	40.5

Source: U.S. Bureau of the Census,
Current Population Reports,
Population Profile of the U.S.: 1981.

There were 28.3 million women working at white-collar jobs in 1981, almost 50% more than in 1972. These women accounted for 65.8% of all employed females in 1981, up from 60.8% nine years earlier. Women employed as either managers and administrators, or professional and technical workers numbered 10.5 million in 1981, a significant 78.0% increase.

Working Women

The number of female service workers rose 22.1% to 8.3 million compared with 6.8 million in 1972.

Female Employment by Occupational Group, 1972, 1981

	1981		1972	
	Number (Mil.)	% of Total	Number (Mil.)	% of Total
Employed women, 16 years & older	43.0	100.0%	31.1	100.0%
White-collar workers	28.3	65.8	18.9	60.8
Professional, technical & kindred workers	7.3	17.0	4.5	14.5
Managers & administrators, except farm	3.2	7.4	1.4	4.5
Sales workers	2.9	6.7	2.2	7.1
Clerical & kindred workers	14.9	34.6	10.8	34.7
Blue-collar workers	5.8	13.5	4.8	15.4
Craft & kindred workers	0.8	1.9	0.4	1.3
Operatives, except transport	4.2	9.8	4.0	12.9
Transport equipment operatives	0.3	0.7	0.1	0.3
Laborers, except farm	0.5	1.2	0.3	1.0
Farm workers	0.5	1.2	0.5	1.6
Service workers	8.3	19.3	6.8	21.9
Food service workers	3.1	7.2	2.3	7.4
Protective service workers	0.1	0.2	0.1	0.3
Private household workers	1.0	2.3	1.4	4.5
Other service workers	4.1	9.5	3.1	10.0

Source: U.S. Bureau of the Census,
Current Population Reports,
Population Profile of the U.S.: 1981.

In 1980, the Bureau of Labor Statistics issued three projections of labor force participation rates covering selected years up to 1995. The middle growth rate, the basis of the following table, assumes a 1.8% annual growth in the total labor force from 1979 to 1985 and a 1.0% annual increase from 1985 to 1995. During this period, about two-thirds of labor force growth will be generated by women, according to the report. More than 6 out of every 10 women will be in the labor force in 1995.

THE POTENTIAL MARKET

Working Women

Projections of the Civilian Labor Force Participation Rates
For Women, 1985, 1990, 1995
(Middle Growth Rate)

	Participation Rates		
	1985	1990	1995
Females, 16 years & older*	56.5%	59.6%	61.2%
By age group:			
16-19 years	59.8	63.9	66.3
20-24 years	76.5	81.4	85.3
25-34 years	75.1	80.7	83.7
35-44 years	72.9	78.6	81.7
45-54 years	61.7	64.3	66.2
55-64 years	41.6	41.7	42.3
65 years & older	7.7	7.3	6.8

* Population projections of all females 16 & over in these years are Series II projections compiled by the Census Bureau in 1977, based on 1970 census figures.

Source: U.S. Bureau of Labor Statistics
Monthly Labor Review, December 1980.

Specialized Markets

The number of marriages and births in the U.S. foreshadow the relative health of specialized dress markets--bridal gowns and maternity dresses. In 1981, 2.4 million marriages were performed, 1% more than in 1980. Similarly, births were up almost 1% in 1981 to 3.65 million versus 3.61 million the prior year.

June was the favored month for marriages, with 11.8% of the year's total weddings, followed by August, with 10.3%. Births are approximately evenly scattered throughout the year, with July and August (both with 9.0% of the total) and April (with 7.6%) representing the extremes.

Total Marriages & Births in the U.S., 1980, 1981

	Total (Thous.)		% Change	Rate Per 1,000 Population	
	1981*	1980(r)	1981/1980	1981	1980(r)
Marriages	2,438	2,413	+ 1.0%	10.6	10.9
Live births	3,646	3,612	+ 0.9	15.9	15.9

* Provisional
(r) = revised

Source: U.S. Department of Health & Human Services,
Monthly Vital Statistics Report.

THE POTENTIAL MARKET

Specialized Markets

Monthly Pattern in Births & Marriages, 1981

	Births		Marriages	
	Number (Thous.)	% of Total	Number (Thous.)	% of Total
Total	3,646	100.0%	2,438	100.0%
January	302	8.3	135	5.5
February	288	7.9	156	6.4
March	295	8.1	147	6.0
April	279	7.6	198	8.1
May	296	8.1	235	9.6
June	292	8.0	287	11.8
July	327	9.0	237	9.7
August	328	9.0	252	10.3
September	319	8.7	216	8.9
October	321	8.8	204	8.4
November	291	8.0	172	7.0
December	307	8.4	200	8.2

Source: Based on U.S. Department of Health & Human Services, Monthly Vital Statistics Report, March 1982.

RETAIL SALES

The latest official information on women's dress sales is contained in the 1977 Census of Retail Trade reports. Only stores with payrolls were included in the merchandise line reports issued by the Census Bureau, but not all store types which sell dresses were required to break down their sales.

According to the census, retail sales of dresses in the major outlet types reporting sales totaled $5.4 billion. Women's ready-to-wear stores sold $2.6 billion worth of dresses in 1977, 47.4% of the total. Department store dress sales amounted to $2.2 billion, or 40.4%.

Reported Sales of Women's Dresses by Store Type, 1977
(Including Stores With Payrolls Only)

	Stores Reporting Dress Sales		Reported Dress Sales	
	Number	Percent	Mil. $	Percent
Total	56,036	100.0%	$5,434.9	100.0%
Women's ready-to-wear stores	32,048	57.2	2,574.4	47.4
Department stores**	8,254	14.7	2,213.7	40.7
Family clothing stores	10,862	19.4	489.2	9.0
Mail order houses	3,650	6.5	122.1	2.3
Other apparel stores***	1,222	2.2	35.5	0.6

(footnotes continued)

RETAIL SALES

(footnotes for preceding table)

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within the stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses.

***Includes lingerie shops and other specialized women's apparel outlets, shoe stores, children's wear stores, and stores primarily selling men's wear.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

Percent of Total Store Sales Accounted For by Women's Dress Sales In Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Sales Accounted For by Women's Dress Sales
Department stores**	$ 76,909.4	2.9%
Women's ready-to-wear stores	12,250.3	21.0
Family clothing stores	7,883.6	6.2

**See footnote in the preceding table.

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY TYPE OF OUTLET

Specialty Stores

Total sales in women's ready-to-wear stores in 1981 exceeded $16.5 billion, 9.7% above their 1980 sales level. Through the first 9 months of 1982, sales were 2.9% higher than the similar 1981 period. The number of women's ready-to-wear stores with payrolls crept up 0.5% in 1980 (the latest year available) to 39,969.

Women's Ready-to-Wear Stores: Total Sales & Number of Stores, 1979-1981

				% Change	
	1981	1980	1979	1981/1980	1981/1979
Total sales (mil. $)	$16,532	$15,074	$14,969	+ 9.7%	+ 10.4%
Number of stores*	na	39,969	39,765	--	--

* Includes only those with payrolls.

Source: Based on U.S. Bureau of the Census,
Revised Monthly Retail Sales & Inventories,
County Business Patterns, 1979, 1980.

RETAIL SALES BY TYPE OF OUTLET

Specialty Stores

Almost 93% of women's ready-to-wear stores with payrolls in the U.S. operated with fewer than 20 employees and almost three-quarters employed less than 10 persons in 1980, according to the Bureau of the Census.

Women's Ready-to-Wear Stores by Employee Size, 1980
(Stores With Payrolls Only)

	Establishments		Employees	
	Number	% of Total	Number	% of Total
Women's ready-to-wear stores, total	39,969	100.0%	349,635	100.0%
By establishment size:				
Under 10 employees	29,226	73.1	127,401	36.4
10-19 employees	7,885	19.7	105,752	30.2
20-49 employees	2,345	5.9	67,118	19.2
50-99 employees	391	1.0	26,265	7.5
100 or more employees	122	0.3	23,099	6.6

Source: U.S. Bureau of the Census,
County Business Patterns, 1980.

The December 1981 Christmas season presented women's ready-to-wear stores with 13.2% of store sales for the year. October was the second largest sales month, with 8.9% of dollar sales taking place that month.

Sales of Women's Ready-to-Wear Stores by Month, 1980, 1981

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1981	6.7%	6.1%	7.4%	8.4%	8.0%	7.6%	7.8%	8.6%	8.5%	8.9%	8.8%	13.2%	100.0%
1980	6.7	6.2	7.6	7.9	8.0	7.2	7.5	8.6	8.3	9.1	9.3	13.6	100.0

Source: U. S. Bureau of the Census,
Revised Monthly Sales & Inventories.

Dress sales in 38 surveyed specialty stores, each with total sales over $1 million, rose a median 4.0% in 1981 over the 1980 level, slower than the typical 8.3% sales growth rate for the entire store, according to the National Retail Merchants Association. Sales of women's dresses fell a median 1.6% from 1980, while juniors' dress sales gained 2.0% and misses' less than 1%.

On average, dress sales account for 8% of total specialty store sales. Sales per square foot for both women's dresses ($170.30) and misses' dresses ($162.90) were above the store median of $157.30, but juniors' dress sales per square foot were considerably below that mark at $88.80.

RETAIL SALES BY TYPE OF OUTLET

Specialty Stores

Merchandising & Operating Results of Dress Departments In Specialty Stores With Sales Over $1 Million, 1981
(Median Results)

	Total Upstairs Store (48)*	All Adult Female Apparel (47)*	All Dresses (38)*	Women's Dresses (16)*	Misses' Dresses (23)*	Juniors' Dresses (27)*
Net sales, % change from last year	+ 8.3%	+ 6.7%	+ 4.0%	- 1.6%	+ 0.9%	+ 2.0%
Sales, % to total store	100.0	50.7	5.4	3.1	4.9	1.9
Sales, % of adult female apparel	--	100.0	8.0	6.4	10.1	3.8
$ sales per sq. ft. of selling space (main or largest unit)	$157.3	$147.1	$109.2	$170.3	$162.9	$ 88.8
Cumulative markon, %	51.2%	51.8%	51.0%	50.5%	50.6%	51.1%
Gross margin, % of net sales, including cash discounts	43.3	43.0	41.0	41.9	39.6	41.9
Markdowns, % of net sales, including employee discounts	18.3	20.9	25.5	23.8	28.0	25.8
Number of stock turns (times)	3.1	3.5	3.6	3.2	3.6	4.2

*Number in parentheses refers to the number of reporting stores in each category.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1981.

Department Stores

Among surveyed department stores with sales in excess of $1 million, overall 1981 dress sales declined a median 1.2% compared with 1980. However, women's dress sales (+2.3%) and misses' dress sales (+0.9%) managed to post small gains, but these were lower than the median 6.7% sales increase in the entire upstairs store. On a median sales basis, declines were reported for juniors' dresses (-0.9%), bridal and formal dresses (-3.5%), utility dresses (-4.3%) and maternity clothing (-5.6%).

At a typical 3.3 stock turns per year, dresses outperformed the median number of stock turns in the total upstairs store (2.7 times). Juniors' dresses had the highest number of stock turns, 4.2, and bridal and formal dresses turned the slowest of the dress categories, 2.1 times.

RETAIL SALES BY TYPE OF OUTLET

Department Stores

Merchandising & Operating Results of Dress Departments in Department Stores With Sales Over $1 Million, 1981
(Median Results)

	Total Upstairs Store (117)*	All Adult Female Apparel (113)*	All Dresses (110)*	Women's Dresses (78)*	Misses' Dresses (82)*
Net sales, % change from last year	+ 6.7%	+ 8.8%	- 1.2%	+ 2.3%	+ 0.9%
Sales, % to total store	90.1	24.5	3.1	0.4	3.0
Sales, % of adult female apparel	--	100.0	7.5	1.7	12.0
$ sales per sq. ft. of selling space (main or largest unit)	$111.8	$129.2	$ 94.9	$104.0	$113.8
Cumulative markon, %	48.2%	50.8%	50.3%	50.7%	50.5%
Gross margin, % of net sales, including cash discounts	42.0	43.0	39.2	42.2	38.6
Markdowns, % of net sales, including employee discounts	13.0	20.9	25.9	23.5	27.6
Number of stock turns (times)	2.7	3.8	3.3	3.3	3.4

	Juniors' Dresses (95)*	Bridal/ Formal Dresses (45)*	Utility Dresses, Aprons & Uniforms (18)*	Maternity Clothing & Accessories (53)*
Net sales, % change from last year	- 0.9%	- 3.5%	- 4.3%	- 5.6%
Sales, % to total store	0.8	0.2	1.1	0.1
Sales, % of adult female apparel	3.2	0.9	5.0	0.6
$ sales per sq. ft. of selling space (main or largest unit)	$ 98.9	$ 82.1	$87.0	$ 91.8
Cumulative markon, %	51.2%	49.6%	50.5%	51.6%
Gross margin, % of net sales, including cash discounts	42.2	38.2	45.0	47.5
Markdowns, % of net sales, including employee discounts	23.7	16.4	18.4	15.9
Number of stock turns (times)	4.2	2.1	3.5	2.9

* Number of reporting stores.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1981.

RETAIL ADVERTISING

Women's dresses were most heavily advertised in April during 1981, according to the Advertising Checking Bureau, which monitors newspaper advertising. Only 4.9% of the year's advertising for dresses was placed in January, the smallest of any month.

Percent of Year's Total Retailers' Newspaper Ad Linage Done Each Month, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Women's dresses	4.9%	7.2%	10.1%	12.6%	10.6%	8.3%	5.5%	8.7%	9.2%	8.5%	7.8%	6.6%	100.0%

Source: Advertising Checking Bureau, Neustadt Reports Div., based on newspaper ad linage in 7 major cities.

CONSUMER PRICE TRENDS

The average consumer price index for unit-priced dresses during the January-September 1982 period fell 2.3% compared with the annual 1981 average. Over the same period, women's apparel rose a small 1%, and the overall index was only 5.6% higher.

Consumer Price Index of Women's Dresses, 1980, 1981 & January-September 1982 Average
(1967=100 unless otherwise indicated)

	January-September 1982	Annual Averages 1981	1980	% Change January-September, 1982/ Annual Average 1981
All items	287.6	272.4	246.8	+ 5.6%
Women's apparel (Dec. 1977=100)	105.4	104.3	103.1	+ 1.0
Unit-priced dresses	160.4	164.2	164.1	- 2.3

CONSUMER BUYING HABITS

The following tables on women's dress purchases have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

In a typical month, 11.4% of NPD households buy dresses, suits, skirts and/or blazers. More households (15.2%) purchased these items in April than any other month.

Percent of Households Purchasing Dresses by Month, 1981

	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Dresses, suits, skirts & blazers	9.7%	8.3%	9.6%	15.2%	13.2%	12.7%	13.0%	12.3%	10.6%	10.8%	9.7%	12.1%

Source: National Panel Diary, quoted in
1983 Newspaper Advertising Planbook,
Newspaper Advertising Bureau.

In the twelve-month period ended June 1982, specialty stores held a 38.4% share of dollars spent on dresses and 30.1% of dress unit sales. Department stores were the next most popular outlet for dress purchases. They accounted for 32.8% of dollars spent and 26.5% of units purchased by NPD panel members over this period.

Percent of Women's Dress Purchases by Outlet Type 1980, 1981 & July 1981-June 1982

	Units			Dollars		
	July 1981-June 1982	1981	1980	July 1981-June 1982	1981	1980
Total women's dress purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	26.5	26.0	27.4	32.8	32.2	31.6
National chains	16.4	17.6	18.4	11.5	12.6	13.5
Specialty stores	30.1	29.5	30.2	38.4	38.4	38.7
Discount stores	18.0	17.5	14.9	10.2	9.8	8.6
All other retailers, including mail order	9.0	9.4	9.1	7.1	7.0	7.6

Source: NPD Research

Over a third (34.2%) of all dresses purchased by panel members between July 1981 and June 1982 retailed for at least $10 but less than $20. In terms of dollars, the $10-$19.99 bracket accounted for 20.4% of total spending for dresses in the period, slightly lower than in 1981 (20.6%) and an almost 2 point drop from 1980 (22.3%).

The $20-29.99 price range garnered 19.8% of total dress spending and 20.6% of unit dress sales in the twelve month period ended June 1982. For the full year 1981, dress sales in the $20-$29 range equaled 20.6% of dollars and 20.5% of units.

Dresses which retail for $80 and over accounted for an increasingly larger share of dollars spent from 1980 to June 1982. In the year ended June 1982, this category held a 13.7% share of total dress spending compared with an 11.1% share in 1981 and a 9.0% share for the year 1980.

Percent of Women's Dress Purchases by Price Points
1980, 1981 & July 1981-June 1982

	Units			Dollars		
	July 1981-June 1982	1981	1980	July 1981-June 1982	1981	1980
Total women's dress purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
By retail price points:						
Less than $10	18.8	21.1	19.8	4.7	5.6	5.5
$10 - 19.99	34.2	33.1	34.8	20.4	20.6	22.3
$20 - 29.99	20.6	20.5	20.9	19.8	20.6	21.4
$30 - 39.99	10.9	10.6	10.5	14.8	15.1	15.1
$40 - 49.99	5.5	5.7	6.0	9.7	10.4	11.2
$50 - 79.99	7.0	6.7	6.2	17.0	16.7	15.6
$80 & over	2.9	2.3	1.8	13.7	11.1	9.0

Close to half (49.6%) of unit sales of dresses in 1981 took place between April and July. June was the singular most popular month in which to buy a dress, with 13.8% of all dresses sold in this month.

Percent Distribution of Women's Dress Purchases by Months, 1980, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units													
1981	5.0%	6.1%	7.8%	12.3%	13.0%	13.8%	10.5%	8.6%	6.5%	5.2%	5.2%	6.0%	100.0%
1980	5.0	5.9	8.6	11.0	12.5	10.5	12.9	9.0	6.3	5.9	6.0	6.4	100.0
Dollars													
1981	4.8	5.3	8.6	12.4	12.8	12.0	8.7	8.5	7.6	5.7	6.4	7.2	100.0
1980	4.8	5.2	8.5	11.7	12.3	9.5	10.7	8.3	7.2	7.7	6.7	7.4	100.0

Source of above tables: NPD Research

Seventeen Magazine's spring apparel buying survey, conducted annually for the magazine, obtained 1981 purchase information from 1,010 teen girls from Seventeen's 2,000-member Consumer Panel, which represents a cross-section of the female teenage market.

Based on the actual number of dresses purchased by respondents, a projected number of over 30 million dresses, worth an estimated $1.2 billion at retail, were bought by a total of 11.7 million teenage girls in 1981.

Dress Purchases by Teenage Females, 1981
(Projected to Total Teenage Market)

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Dresses			
School			
Below knee-length	4,812	6,672	$ 206,565
Knee-length	3,699	8,134	244,996

(continued)

Dress Purchases by Teenage Females, 1981
(Projected to Total Teenage Market)
(continued)

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Dresses			
Date			
Below knee-length	3,763	4,399	$ 163,554
Knee-length	2,712	5,521	227,299
Ankle-length	173	180	6,886
Formal gowns	4,144	4,172	289,662
Jumpers	940	1,078	23,748
Projected totals	11,693	30,156	1,162,710

At the time the survey was conducted (May 1982), 63.2% of the respondents favored a skirt length just below the knee. Only 19.5% expect that this length will remain their favorite a year later. Teenagers with no preference as to skirt length will rise from 9.7% of respondents in 1982 to an anticipated 27.8% next year.

Current & Year-From-Now Favorite Skirt Length

	Current Favorite	Year-From-Now Favorite
Skirt lengths		
Just below the knee	63.2%	19.5%
At the knee	12.7	14.0
Any and all lengths	9.7	27.8
Midi	7.7	12.9
Just above the knee	5.4	23.5
Ankle-length	1.3	22.3

Source: Seventeen Magazine
"1982 Spring Apparel Study."

More than 6 out of 10 respondents usually shop in department stores for dresses while 39.9% usually shop in boutiques and specialty stores.

Usual Place of Purchase of Dresses, 1981

	% of Respondents*
Department store	61.6%
Boutique/specialty store	39.7
Discount store	4.7
Variety store	3.8
Mail order	4.4
Other	2.8

* Total adds to more than 100.0% due to multiple mentions.

Source: Seventeen Magazine
"1982 Spring Apparel Study."

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in February, 1983): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

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INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

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SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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TABLE OF CONTENTS

Page

CURRENT TRENDS.. 1
POPULATION TRENDS... 2
  BIRTHS.. 2
  TOTAL POPULATION.. 5
  STRUCTURE OF THE POPULATION BY AGE, SEX, RACE & SPANISH ORIGIN.. 6
  PROJECTIONS OF THE U.S. POPULATION........................ 8
  METROPOLITAN VS. NON-METROPOLITAN AREA POPULATION.......... 9
  POPULATION BY REGIONS & STATES............................ 11
  REGIONAL PROJECTIONS...................................... 13
  MOBILITY.. 15
MARRIAGES & MARITAL STATUS.................................. 16
HOUSEHOLDS & FAMILIES....................................... 18
LIVING ARRANGEMENTS... 20
SCHOOL ENROLLMENT... 22
EDUCATIONAL ATTAINMENT...................................... 24
LABOR FORCE, EMPLOYMENT & EARNINGS.......................... 26
  UNEMPLOYMENT.. 29
  EMPLOYMENT BY INDUSTRY & OCCUPATION....................... 31
  EMPLOYMENT BY INDUSTRY & OCCUPATION, BY SEX............... 32
  FULL-TIME & PART-TIME WORKERS............................. 35
  EARNINGS.. 35
INCOME.. 39
  PERSONAL.. 39
  HOUSEHOLD... 44
CONSUMER PRICES... 48
CONSUMER CREDIT... 49
PERSONAL CONSUMPTION EXPENDITURES........................... 51
RETAIL SALES.. 54

SCHEDULE OF ADDITIONAL FACT FILES........................... 57

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CONSUMER MARKET DEVELOPMENTS

Current Trends

At the start of 1983 the U.S. economy registered signs of a mild recovery from the deep recession which got underway in July 1981. Most economists, however, look for a generally slow pickup in activity, which will be greatly affected by developments in interest rates and in unemployment.

In January, the President's Council of Economic Advisors forecast a 1.4% real growth rate in the economy for the year 1983 over 1982. A subsequent Conference Board analysis, however, anticipates a better rate. Expectations of generally better economic conditions in 1983 are based on the relaxing of monetary policy, bringing lower interest rates and growth in the money supply. The restrictive monetary policy in 1982 slowed inflation dramatically, a positive development that year. The outlook now is for inflation to stay down, leading to some growth in disposable income and consumers' disposition to spend.

However, there is no doubt that the recession continues to have an impact across the country, stifling growth in such previously fast-growing areas as the Southwest and Rocky Mountains and industrialized areas. Beyond the recession are deep-seated problems involving the ability of many U.S. industries to compete and to survive under the pressures of foreign competition and loss of markets.

Some private economic forecasts are somewhat more optimistic than that of government sources, but all see the key to recovery in lower interest rates. The Conference Board's Economic Forum projects an annual growth of 7.7% in the Gross National Product in terms of current dollars; 2.7% in real terms in 1983. Inflation is expected to rise by 4.8%. (The 1982 rate was 3.9%.) An unemployment rate averaging 9.8% is anticipated by this source; and the rate is expected to remain high through 1984.

The Board forecasts a rise of about 8.2% in current dollars in personal consumption spending, up from 6.8% in 1982. In real terms, a rise of 3.5% is anticipated for 1983, up from 2.5% in 1982. The Citibank Economic Forecasting Service looks for real consumer outlays to rise at an annual rate of about 4% in the first half of 1983, 3% in the second half. Spending may rise somewhat faster than personal income, resulting in a decline in the savings rate.

It is expected that personal income will rise only moderately in 1983, reflecting a relatively low rate of wage increases, a lower increase in unemployment payments and other transfer payments, and a lower rate of increase in interest income. The 10% personal income tax set for July 1 is expected at this time to go through on schedule, however, and according to a Goldman, Sachs & Co. analysis, consumers' wealth and liquidity is increasing, along with their ability to incur debt.

Declining interest rates and less inflation will tempt consumers to use their borrowing potential to buy durables. Spending for cars, for houses, and appliances, will lead in the recovery, just as the downturn in this sector led the way in the recession. The pent-up demand for these products will make them do better than soft goods. Apparel and other soft goods may not benefit from increases in spending until 1984.

CONSUMER MARKET DEVELOPMENTS

Current Trends (continued)

There is a lack of agreement on the level of activity in clothing and footwear in 1983. Wharton Econometrics looks for a growth of about 1.4% in consumer spending, followed by a 6.5% rise in 1984. Chase Econometrics forecasts a 2.2% annual growth in apparel and footwear sales this year, increasing to 3.9% in 1984, with women's wear outperforming men's. The Citibank Economic Forecast Service year-end outlook anticipates that apparel and footwear spending will rise from $84.3 billion (1972 dollars) last year to $87.5 billion in 1983 (a gain of 3.8%).

Projections on the movement of key economic indicators affecting consumer markets in 1983 have been compiled by Morgan Guaranty Trust Company of New York as follows:

Economic Projections
(Percent change at annual rate from previous quarter, except where noted)

	1982	1983			
	Q4	Q1	Q2	Q3	Q4
Real Gross National Product	- 2.2%	+ 2.9%	+ 2.7%	+ 4.2%	+ 4.9%
Real consumer spending	+ 2.3	+ 2.8	+ 2.4	+ 3.8	+ 4.3
Real business-capital outlays	- 11.1	- 9.4	+ 0.2	+ 3.0	+ 4.5
GNP delator	+ 5.3	+ 4.5	+ 5.1	+ 4.5	+ 5.0
Consumer prices	+ 2.9	+ 2.7	+ 5.6	+ 5.8	+ 5.6
Real disposable personal income	- 1.6	+ 2.7	0	+ 4.4	+ 4.2
Saving rate (%)	6.1%	6.1%	5.5%	5.7%	5.7%
Housing starts (millions)	1.3	1.4	1.5	1.6	1.6
Auto sales (millions)	8.6	8.8	8.9	9.4	9.7
Unemployment rate (%)	10.7%	11.0%	11.2%	11.3%	11.3%

Source: The Morgan Guaranty Survey, January 1983.

POPULATION TRENDS

Births

After reaching a record low in 1976, the U.S. birth rate has inched up. In 1982 the total of reported live births (some 3.7 million) was the highest since the year 1970 (over 3.7 million). The reason is obvious--women who are part of the baby boom period (1947-1964) now constitute a record number of young women in prime child-bearing age groups.

In 1960 the U.S. had 36 million women of child-bearing age; in 1980 almost 52 million were in that category. But the birth total now is considerably less than it would have been if the 1960 pattern had been repeated. In that year 4.3 million babies were born. More married women are remaining childless; more women are single or divorced without children.

Demographers are not in general agreement on the future course of the U.S. birth rate, although the Census Bureau forecasts indicate the high point is still five years away. Despite the upward creep in fertility rates and in births in the past few years, an analysis of birth expectations among American women by the

Births (continued)

Census Bureau in 1980 (published in 1982)--the most recent in a series compiled since 1976--showed no change in regard to number of children they planned to have, which averages two. But the actual number in recent years have hovered at between 1.76 and 1.88 babies during a lifetime as opposed to 3.7 in the Forties and Fifties. (The level required for the natural replacement of the population is 2.1 babies.)

As women have postponed marriage and/or become locked into jobs, child-bearing has frequently been postponed, or the decision made to not have children at all. These appear to be firmly entrenched characteristics that do not presage dramatic changes in current birth statistics.

Detailed information on the demographic characteristics of the women who are having children, and those that are not, have been published by the Census Bureau based on the Current Population Survey for June 1980. (Population Characteristics, Series P-20, No. 375, issued in 1982).

Of women 18 to 44 years of age, 70% were childless. Among employed women 18 to 44, the figure rose to 81%, compared with 47.3% among women not in the labor force. Typical child-bearing patterns: rates were highest for women in their twenties, dropping sharply with increasing age; the fertility rate for Hispanics was higher than that for whites or blacks; fertility rates were highest in the West and lowest in the Northwest; it was highest among women who had the least education and among those not in the labor force. Fertility also has a direct relationship to income. The lower the family income, the higher the fertility.

A Census Bureau analysis covering 1981 (Population Profile of the U.S., Series P-20, 374) indicated that among ever-married women 25 to 29 years old, 25% were childless in 1981 compared with 16% in 1970. For women 30 to 44 the figure increased from 8% to 14%.

In 1981, all women 18 to 24 years old expected an average of 2.0 lifetime births. For currently married women 18 to 24 in 1981, this figure was 2.2, virtually unchanged since 1974. However, as previously noted the number of children actually born has averaged below expectations.

First births, which provide a major share of the market for infants' wear and supplies of all types, account for most of the birth total. A rise in births among older women has been a major trend, as women who had delayed marriage or child-bearing to pursue careers decide to start families.

However, the reduced rate of growth in the number of women in age groups where the child-bearing rates are the highest, 20-24 and 25-29 years of age, in coming years is a major factor in the outlook for smaller increases in the number of births.

The number of live births has increased each year since 1975. The reported 1981 total, 3,646,000 was the highest since 1970 when there were 3,731,000 live births.

Births (continued)

The birth rate remained stable at 15.9 live births per 1,000 population in 1980 and 1981, which was the highest rate since 1971 when it reached 17.2 per 1,000.

Provisional data for the first 10 months of 1982 indicate a rise of 1.2% in the number of births compared with the same period of 1981. The birth rate for the January through October 1982 period was 16.0, matching the rate in the same period of 1981. The fertility rate was 67.9 live births per 1,000 women ages 15-44, virtually unchanged from the rate of 68.0 for the first 10 months of 1981.

Live Births in the U.S., Birth Rates & Fertility Rates, 1971-1981

	Number (thous.)				Birth Rate*				Fertility Rate**			
	All		All Other		All		All Other		All		All Other	
Year	Races	White	Total	Black	Races	White	Total	Black	Races	White	Total	Black
1981(p)	3,646.0	na	na	na	15.9	na	na	na	67.6	68.5	na	81.3
1980	3,612.3	2,898.7	713.5	589.6	15.9	14.9	22.5	22.1	68.4	64.7	88.6	88.1
1979	3,494.4	2,808.4	686.0	577.9	15.6	14.5	22.2	22.0	67.2	63.4	88.5	88.3
1978	3,333.3	2,681.1	652.2	551.5	15.0	14.0	21.6	21.3	65.5	61.7	87.0	86.7
1977	3,326.6	2,691.1	635.6	544.2	15.1	14.1	21.6	21.4	66.8	63.2	87.7	88.1
1976	3,167.8	2,567.6	600.2	514.2	14.6	13.6	20.8	20.5	65.0	61.5	85.8	85.8
1975	3,144.2	2,552.0	592.2	511.6	14.6	13.6	21.0	20.7	66.0	62.5	87.7	87.9
1974	3,160.0	2,575.8	584.1	507.2	14.8	13.9	21.2	20.8	67.8	64.3	89.8	89.7
1973	3,137.0	2,551.0	585.9	512.6	14.8	13.8	21.7	21.4	68.8	64.9	93.4	93.6
1972	3,258.4	2,655.5	602.8	531.3	15.6	14.5	22.8	22.5	73.1	68.9	99.5	99.9
1971	3,556.0	2,919.7	636.2	565.0	17.2	16.1	24.6	24.4	81.6	77.3	109.1	109.7

na = not available
(p) = provisional
*Live births per 1,000 population
**Live births per 1,000 women 15-44 years of age.

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics.
Monthly Vital Statistics Report.

There were close to 660,000 births among unmarried women in 1980, 11.4% more than in 1979, setting a new high. Nearly one-third of the increase, however, was due to a change in the method of compilation of the figures. If this is taken into account the total falls to 645,000, representing an increase of 7.4%.

As women have become involved with careers there has been a growing tendency to postpone having children. This trend has continued, although the latest statistics on births by age of mother available currently are for the year 1980.

Births (continued)

Distribution of Births by Age of Mother, 1978-1980

	1980	1979	1978
Total births	100.0%	100.0%	100.0%
Age of mother:			
Under 20 years	15.6	16.0	16.6
20 - 24 years	33.9	34.0	34.2
25 - 29 years	30.7	30.6	30.5
30 - 35 years	15.2	14.8	14.2
35 & older	4.6	4.6	4.5

Source: National Center for Health Statistics, Monthly Vital Statistics Report.

More than 40% of the live births recorded in 1980 were first births (which account for a disproportionate share of the infants' wear market). Second births accounted for 31.7%; third, 14.9%; fourth or higher, 10.6%.

A consistent monthly pattern in births has been observed for many years. The peaks fall in August and in September.

Total Population

The total resident population of the U.S. on July 1, 1982 rose 0.7% over 1981, reaching 231,479,000. The civilian portion of the population represented 99.3% of the total compared with 98.6% on July 1, 1970.

Estimated Population of the U.S.
(In Thousands)

Date	Total Population Including Armed Forces Overseas	Resident Population	Civilian Population
July 1, 1982	231,990	231,479	229,805
July 1, 1981	229,807	229,307	227,659
July 1, 1980	226,658	227,156	225,552
July 1, 1979	225,055	224,567	222,969
July 1, 1975	215,973	215,465	213,788
July 1, 1970	205,052	203,984	201,131

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25

POPULATION TRENDS

Age, Sex, Race & Spanish Origin

As in the 1970's, the population in the prime household-forming ages (25 to 34) and the elderly population (65 years and over) has continued to register the fastest growth. After declining in the 1970's, the number of persons under age 15 has leveled off since 1980, although the share of the total population represented by this group reached its lowest level in U.S. records (22.3%) in 1981.

The elderly population, on the other hand, has increased to a peak proportion of the total (11.4%), and the median age of the U.S. population, 30.3 years, equaled the previous high level attained in 1952 before the peak of the baby boom.

The complete census of the U.S. population, covering the year 1980, showed a wide range in age structure among the States. Compared with the national median age figure of 30.0, on a State basis the median ranged from a low of 24.2 in Utah to 34.7 in Florida, reflecting high fertility and the immigration of retirees, respectively. Several industrial states in the Northeast had median ages of about 32. The proportion of elderly ranged from 2.9% in Alaska to 17% in Florida.

In 1980 minority-group populations had regional distributions quite different from that of the total population. Slightly over one-half of the black population lived in the South. The West had more Hispanics, Asian and Pacific Islanders, and American Indians, than did the North or South.

Race & Spanish Origin of the Resident Population of the U.S.
April 1, 1970 & 1980

	Number (000)		% Distribution	
	1980	1970	1980	1970
Total	226,505	203,212	100.0%	100.0%
White	188,341	177,749	83.2	87.5
Black	26,488	22,580	11.7	11.1
American Indian, Eskimo, Aleut	1,418	827	0.6	0.4
Asian & Pacific Islander	3,501	1,539	1.5	0.8
Other races	6,757	517	3.0	0.3
Persons of Spanish Origin*	14,606	9,073	6.4	4.5

*Persons of Spanish origin may be of any race. In the 1980 Census 86% of the 6,757,000 persons of other races were identified as Spanish in the separate origin questionnaire. In 1980, 56% of the persons of Spanish origin were classified as white compared with 93% in 1970.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374.

Age, Sex, Race & Spanish Origin (continued)

Distribution of the Resident Population
By Age & by Sex, 1970, 1981

	Number (000) (July 1)		% Distribution		% Change
	1981	1970	1981	1970	1981/1970
Total all ages	229,307	203,984	100.0%	100.0%	+ 12.4%
Under 5 years	16,939	17,166	7.4	8.4	- 1.3
5 to 9 years	16,045	19,919	7.0	9.8	- 19.4
10 to 14 years	18,241	20,853	8.0	10.2	- 12.5
15 to 24 years	42,109	35,810	18.4	17.6	+ 17.6
25 to 34 years	38,804	25,109	16.9	12.3	+ 54.5
35 to 44 years	26,450	23,040	11.5	11.3	+ 14.8
45 to 54 years	22,530	23,299	9.8	11.4	- 3.3
55 to 64 years	21,835	21,167	9.5	10.4	+ 3.1
65 & over	26,253	20,107	11.4	9.9	+ 30.6
Median age	30.3	28.0			
Male population, total	111,423	99,291	100.0	100.0	+ 12.2
Under 5 years	8,667	8,751	7.7	8.8	- 1.0
5 to 9 years	8,204	10,152	7.4	10.2	- 19.2
10 to 14 years	9,321	10,622	8.4	10.7	- 12.2
15 to 24 years	21,277	17,748	19.1	17.9	+ 19.9
25 to 34 years	19,268	12,324	17.3	12.4	+ 56.3
35 to 44 years	12,983	11,212	11.7	11.3	+ 15.8
45 to 54 years	10,888	11,236	9.8	11.3	- 3.1
55 to 64 years	10,256	10,155	9.2	10.2	+ 1.0
65 & over	10,560	8,413	9.5	8.5	+ 25.5
Median age	29.1	26.8			
Female population, total	117,884	104,692	100.0	100.0	+ 12.6
Under 5 years	8,272	8,415	7.0	8.0	- 1.7
5 to 9 years	7,841	9,768	6.7	9.3	- 19.7
10 to 14 years	8,921	10,230	7.6	9.8	- 12.8
15 to 24 years	20,833	18,061	17.7	17.3	+ 15.3
25 to 34 years	19,535	12,785	16.6	12.2	+ 52.8
35 to 44 years	13,467	11,827	11.4	11.3	+ 13.9
45 to 54 years	11,642	12,063	9.9	11.5	- 3.5
55 to 64 years	11,679	11,011	9.9	10.5	+ 6.1
65 & over	15,693	11,693	13.3	11.2	+ 34.2
Median age	31.6	29.2			

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 917.

Note: For detailed information on the "baby boom generation," see the MARKET PACESETTERS FACT FILE (1981).

POPULATION TRENDS

Projections of the U.S. Population

In October 1982 the U.S. Census Bureau issued an advance report covering a new series of projections on the U.S. population by age, race and sex for 1982 to 2050, based on July 1, 1981 population estimates. The three series are derived from alternative assumptions on fertility, mortality and net immigration levels. Projections for the year 1985, for example, range from a low of 237,366,000 for the total population to a high of 240,364,000.

The following information is the "middle" series, reflecting the middle assumptions on future developments in the three components, and looking to a population totaling 238,648,000 by 1985.

Projections of the U.S. Population by Age 1982-2000 (Middle Series)
(Numbers in millions. Includes Armed Forces overseas)

Year	Total	Under 5 Years	5-14	15-19	20-24	25-34	35-44	45-54	55-64	65+	Median Age
1982	232.0	17.4	34.0	19.8	21.9	39.5	28.1	22.3	22.1	26.8	30.6
1983	234.2	17.8	33.7	19.2	21.8	40.2	29.4	22.3	22.2	27.4	30.9
1985	238.6	18.5	33.4	18.4	21.3	41.8	32.0	22.5	22.2	28.7	31.5
1990	249.7	19.2	35.4	17.0	18.6	43.5	37.8	25.4	21.1	31.8	33.0
1995	259.6	18.6	38.1	16.9	17.1	40.5	42.0	31.4	20.9	34.0	34.7
2000	268.0	17.6	38.3	18.9	17.1	36.4	43.7	37.1	23.8	35.0	36.3

Percentage Distribution

Year	Total	Under 5 Years	5-14	15-19	20-24	25-34	35-44	45-54	55-64	65+
1982	100.0	7.5	14.7	8.5	9.4	17.0	12.1	9.6	9.5	11.6
1983	100.0	7.6	14.4	8.2	9.3	17.2	12.6	9.5	9.5	11.7
1985	100.0	7.8	14.0	7.7	8.9	17.5	13.4	9.4	9.3	12.0
1990	100.0	7.7	14.2	6.8	7.5	17.4	15.1	10.2	8.4	12.7
1995	100.0	7.2	14.7	6.5	6.6	15.6	16.2	12.1	8.0	13.1
2000	100.0	6.6	14.3	7.0	6.4	13.6	16.3	13.8	8.9	13.1

Population Projections For Selected Years by Sex/Age Group
(In Thousands)

	Males			Females		
	1983	1985	1990	1983	1985	1990
Total	113,977	116,124	121,498	120,216	122,525	128,234
Age Groups						
Under 5 years	9,133	9,453	9,831	8,713	9,009	9,369
5 to 14	17,232	17,068	18,095	16,471	16,311	17,280
15 to 19	9,773	9,390	8,663	9,393	9,015	8,294
20 to 24	11,082	10,800	9,433	10,770	10,482	9,134
25 to 44	34,583	36,680	40,594	35,095	37,099	40,758
45 & over	32,174	32,733	34,882	39,775	40,609	43,399

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-25, No. 922,
(Advance report issued October 1982).

Projections of the U.S. Population (continued)

The changing components of population growth expected in coming years will lead to marked changes in the age and race distribution of the population over the next 70 years. Among the significant developments envisioned in the "middle" projections are the following:

- The percentage of the population aged 65 and over would rise from 11.4% in 1981 to 13.1% in the year 2000 and 21.7% in 2050.
- The population of primary-school age (5 to 13 years) would decrease from 30.7 million in 1981 to 29.6 million in 1985, after which it would increase to 34.4 million by 1995.
- The population of secondary-school age (14 to 17 years) would decline from 14.9 million in 1981 to 12.9 million in 1990 before increasing to 15.4 million in 2000.
- The population of 18-and-19 year olds, the prime group entering the labor force, college, and the Armed Forces, would decline from 8.5 million in 1981 to 6.5 million in 1995 before rising slowly to 7.5 million in 2000.
- The population of young adults aged 25 to 34 would increase briefly from 39 million in 1981 to 44 million in 1990 before declining to 36 million in 2000.
- Overall, the U.S. population would grow older, with the median age increasing from 30.3 years in 1981 to 36.3 years in 2000 and 41.6 years in 2050.

The advance report, on which the above figures are based, includes details for single years of age. This report is to be followed by a more detailed report which might include slight revisions in the projected numbers.

Metropolitan Vs. Non-Metropolitan Area

Results of the 1980 population census confirmed a striking tendency toward population deconcentration in the U.S. and a marked shift in migration patterns between metropolitan and non-metropolitan areas. According to John F. Long, chief of the Population Projections Branch of the Census Bureau's Population Division, the greatest growth trends are noted in the most remote category of non-metropolitan counties, with the result that distinctions between metropolitan and non-metropolitan areas are becoming blurred.

Suburbanization not only continued during the 1970's but extended its reach, while many central cities lost population during the decade, particularly in the largest metropolitan areas. Now non-metropolitan areas are growing almost as fast as suburbs. The deconcentration trend, according to Long, should continue for at least another decade or two--which means the relatively empty areas of the South and West will continue to fill with people, the big cities will continue to lose people, the suburbs and extended suburbs will keep growing, and towns and small cities outside of metropolitan areas will become increasingly metropolitan in character.

Metropolitan Vs. Non-Metropolitan Area (continued)

The shift to the suburbs has been particularly strong among blacks and persons of Spanish origin. In areas within metropolitan areas but outside of the central cities the black population rose almost 43% from 1970 to 1980; the Spanish origin population, 81%. This compares with a 13% rise in the white suburban population.

Percent Increase in Metropolitan & Non-Metropolitan Population by Decades, 1940-1980

	1940-1950	1950-1960	1960-1970	1970-1980
U.S. population, total	14.5%	18.5%	13.3%	11.4%
Inside Standard Metropolitan Areas	22.0	26.4	16.6	10.2
Central cities	14.0	10.7	6.4	0.1
Outside central cities	35.5	48.6	26.8	18.2
Outside Standard Metropolitan Areas	6.1	7.1	6.8	15.1

Note: Data reflects areas as defined at end of each decade.

Source: U.S. Bureau of the Census, 1980 Census of Population, Supplementary Reports (PC80-S1-5).

Central City & Suburban Population, by Race, 1980/1970

	Number (000) 1980	% of U.S. Total 1980	% of U.S. Total 1970	% Change 1980/1970
All races, U.S. total	226,505	100.0%	100.0%	+ 11.4%
Metropolitan areas	169,405	74.8	75.6	+ 10.2
In central cities	67,930	30.0	33.4	+ 0.1
Suburban (outside central cities)	101,475	44.8	42.2	+ 18.2
Non-metropolitan areas	57,100	25.2	24.4	+ 15.1
White, total	188,341	100.0	100.0	+ 6.0
Metropolitan areas	138,044	73.3	75.1	+ 3.3
In central cities	47,014	25.0	29.9	- 11.5
Suburbs	91,029	48.3	45.3	+ 13.1
Non-metropolitan areas	50,297	26.7	24.9	+ 13.9
Black, total	26,488	100.0	100.0	+ 17.3
Metropolitan areas	21,474	81.1	79.1	+ 20.2
In central cities	15,301	57.8	60.0	+ 13.0
Suburbs	6,173	23.3	19.2	+ 42.7
Non-metropolitan areas	5,014	18.9	20.9	+ 6.5
Spanish origin, total	14,606	100.0	100.0	+ 61.0
Metropolitan areas	12,793	87.6	86.3	+ 63.5
In central cities	7,351	50.3	53.2	+ 52.4
Suburbs	5,443	37.3	33.1	+ 81.3
Non-metropolitan areas	1,813	12.4	13.7	+ 45.4

Source: U.S. Bureau of the Census, 1980 Census of Population, Supplementary Reports (PC80-S1-5).

POPULATION TRENDS

Population by Regions & States

Of the over 26 million increase in resident population of the United States between 1970 and 1981, more than 14 million (54.3%) occurred in the South while another 9.3 million (35.8%) was in the western region. The rates of growth for the South and West were the highest, with percentage increases that were approximately twice the national average. In contrast, the Northeast and North Central regions recorded only about 10% of the nation's growth since 1970, causing the North's share of the population to decline from 52% to 47%.

The only state to register a decline in population between 1970 and 1981 was New York (-3.5%). The District of Columbia declined 16.6%. The largest increases in the U.S. during the period were registered by Nevada (+72.8) and Arizona (+57.4%).

Resident Population of States & Regions, 1970, 1981

	Number (000)		% Change
	July 1, 1981	April 1, 1970 (Census)	1981/1970
U.S. total	229,307	203,302	+ 12.8%
New England:	12,444	11,847	+ 5.0
Maine	1,333	994	+ 34.1
New Hampshire	936	738	+ 26.8
Vermont	516	445	+ 16.0
Massachusetts	5,733	5,689	+ 0.8
Rhode Island	953	950	+ 0.3
Connecticut	3,134	3,032	+ 3.4
Middle Atlantic:	36,876	37,213	- 0.9
New York	17,602	18,241	- 3.5
New Jersey	7,404	7,171	+ 3.2
Pennsylvania	11,871	11,801	+ 0.6
East North Central:	41,656	40,263	+ 3.5
Ohio	10,781	10,657	+ 1.2
Indiana	5,468	5,195	+ 5.3
Illinois	11,462	11,110	+ 3.2
Michigan	9,204	8,882	+ 3.6
Wisconsin	4,742	4,418	+ 7.3
West North Central	17,237	16,328	+ 5.6
Minnesota	4,094	3,806	+ 7.6
Iowa	2,899	2,825	+ 2.6
Missouri	4,941	4,678	+ 5.6
North Dakota	658	618	+ 6.5
South Dakota	686	666	+ 3.0
Nebraska	1,577	1,485	+ 6.2
Kansas	2,383	2,249	+ 6.0

(continued)

POPULATION TRENDS

Population by Regions & States (continued)

Resident Population of States & Regions, 1970, 1981
(continued)

	Number (000)		% Change
	July 1, 1981	April 1, 1970 (Census)	1981/1970
South Atlantic:	37,751	30,679	+ 23.1%
Delaware	598	548	+ 9.1
Maryland	4,263	3,924	+ 8.6
District of Columbia	631	757	- 16.6
Virginia	5,430	4,651	+ 16.7
West Virginia	1,952	1,744	+ 11.9
North Carolina	5,953	5,084	+ 17.1
South Carolina	3,167	2,591	+ 22.2
Georgia	5,574	4,588	+ 21.5
Florida	10,183	6,791	+ 49.9
East South Central:	14,723	12,808	+ 15.0
Kentucky	3,662	3,221	+ 13.7
Tennessee	4,612	3,926	+ 17.5
Alabama	3,917	3,444	+ 13.7
Mississippi	2,531	2,217	+ 14.2
West South Central:	24,470	19,326	+ 26.6
Arkansas	2,296	1,923	+ 19.4
Louisiana	4,308	3,645	+ 18.2
Oklahoma	3,100	2,559	+ 21.1
Texas	14,766	11,199	+ 31.9
Mountain:	11,694	8,290	+ 41.1
Montana	793	694	+ 14.3
Idaho	959	713	+ 34.5
Wyoming	492	332	+ 48.2
Colorado	2,965	2,210	+ 34.2
New Mexico	1,328	1,017	+ 30.6
Arizona	2,794	1,775	+ 57.4
Utah	1,518	1,059	+ 43.3
Nevada	845	489	+ 72.8
Pacific:	32,456	26,548	+ 22.3
Washington	4,217	3,413	+ 23.6
Oregon	2,651	2,092	+ 26.7
California	24,196	19,971	+ 21.2
Alaska	412	303	+ 36.0
Hawaii	981	770	+ 27.4

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 913 (May 1982);
Series P-25, No. 876 (Feb. 1980).

Population by Regions & States (continued)

Of the 10 Standard Metropolitan Areas with the highest population growth rates from 1970 to 1980 five were in Florida, two in Nevada. Twenty-nine SMSA's declined in population during the 1970's. All but one were in the Northeast or North Central regions and included several of the nation's largest metropolitan concentrations--New York, Boston, Philadelphia, Buffalo, Pittsburgh, Cleveland, Detroit, Milwaukee and St. Louis. No SMSA in the South lost population during the 1970's.

The 10 Fastest Growing SMSA's, 1970 to 1980

Rank	SMSA	Percent Increase
1	Fort Myers-Cape Coral, Fla.	95.1
2	Ocala, Fla.	77.4
3	Las Vegas, Nev.	69.0
4	Sarasota, Fla	68.0
5	Fort Collins, Colo.	65.9
6	West Palm Beach-Boca Raton, Fla.	64.2
7	Fort Lauderdale-Hollywood, Fla.	63.5
8	Olympia, Wash.	61.6
9	Bryan-College Station, Tex.	61.4
10	Reno, Nev.	59.9

Source: U.S. Bureau of the Census, 1980 Census of Population, Supplementary Reports (PC80-S1-5).

Regional Projections

According to a report issued by the National Planning Association, Washington, D.C., in August 1982, Texas, California and Florida will lead the nation in both population and employment growth over the next 20 years. Of a projected 40 million increase in population between 1980 and 2000, 12.3 million (about 30%) will be in these states, with Texas in the lead, acquiring 5.5 million people by the year 2000.

A U.S. Bureau of Economic Analysis report issued in 1980, showed the Rocky Mountain region as the fastest growing area of the country between 1980 and the year 2000. This area is expected to grow by 31.8% during this period reaching a total population of 8.7 million people, up from the current figure of 6.6 million. A close second to the Rocky Mountain states in growth during this period, are those in the Southwest segment, which are estimated to grow by 25.4% to 26.7 million people.

The Mideast region is expected to register the lowest growth rate of any region between 1980 and 2000, rising a nominal 1.2% to 42.7 million people.

Regional Projections (continued)

Projections of Population by Region, 1980 - 2000
(Totals in Millions)

	Total Population			% Change	% of Population		
	1980	1990	2000	2000/1980	1980	1990	2000
United States, total	226.5	243.1	258.7	+ 14.2%	100.0%	100.0%	100.0%
Rocky Mountain	6.6	7.7	8.7	+ 31.8	2.9	3.2	3.4
Southwest	21.3	23.7	26.7	+ 25.4	9.4	9.7	10.3
Southeast	52.6	57.2	62.6	+ 19.0	23.2	23.5	24.2
Far West	32.6	26.3	39.1	+ 19.9	14.4	14.9	15.1
Plains	17.2	18.4	19.4	+ 12.8	7.6	7.6	7.5
Great Lakes	41.7	44.1	45.8	+ 9.8	18.4	18.1	17.7
New England	12.3	13.1	13.7	+ 11.4	5.4	5.4	5.3
Mideast	42.2	42.6	42.7	+ 1.2	18.6	17.5	16.5

Source: U.S. Department of Commerce,
Bureau of Economic Analysis,
Survey of Current Business,
November 1980.

The Conference Board has compiled a broad outline of the demographic and economic developments anticipated in the next decade in the nation's nine major regions, as summarized in the table below. The Sunbelt States and the West are expected to show the greatest growth in population and in total income, with meager growth in the population of the Middle Atlantic States.

Projections of Population & Personal Income by Place

	Population		Personal Income		Per Capita Income	
	Distribution per 1,000 persons 1990	% Change 1980/1990	Distribution per $1,000 1990	% Change 1980/1990	U.S. Average = 100 1980	1990
United States, total	1,000.0	9.4%	$1,000.0	46.5%	100	100
New England	54.0	6.2	52.9	39.3	101	99
Middle Atlantic	151.8	0.5	153.5	32.2	104	104
East North Central	181.4	6.3	188.3	41.6	105	105
West North Central	75.7	6.9	73.7	43.2	97	98
South Atlantic	165.2	13.0	158.0	53.9	94	95
East South Central	65.2	11.2	56.4	57.8	81	87
West South Central	107.6	14.5	105.6	57.7	94	95
Mountain	54.1	19.9	53.3	65.8	95	96
Pacific	145.0	14.1	158.3	48.7	112	108

Source: U.S. Department of Commerce; The Conference Board (*Across the Board*, May 1981).

POPULATION TRENDS

Mobility

Of the 202.2 million persons 4 years old and over in the population in 1980, 91.2 million (45.1%) had changed addresses during the period March 1975 to March 1980. The Western region ranked highest in the percent of population who had moved during the period, (53.9%) while the Northeast had the lowest ratio (36.1%). About 43% of the people who moved went to a different county; while 20% moved to a new state; 1.9% came from abroad.

The highest mobility rates are usually found for persons in their twenties when many are establishing their own households, starting new jobs, finishing school or service in the Armed Forces, or getting married. In their latter twenties, many are buying a house or moving to housing more convenient to schools. In the 5-year period, 77% of the persons 25 to 29 years old in 1980 and 65% of those 20 to 24 had changed residence, compared with only 45% of the total population. Young children have high mobility rates reflecting the high mobility of their young parents.

Mobility Status of the Population 4 Years Old & Over
Between March 1975 & March 1980

		Region of Residence in 1980			
	U.S. Total	Northeast	North Central	South	West
Persons 4 years old & over (in thousands)	202,216	45,249	53,544	65,742	37,501
Residence in 1980 compared with 1975					
Total (percent)	100.0%	100.0%	100.0%	100.0%	100.0%
Living in:					
Same house	53.0	62.1	55.2	51.0	42.5
Different house in U.S. (movers)	45.1	36.1	43.7	47.4	53.9
Same county	25.8	23.3	26.4	24.9	29.3
Different county	19.3	12.8	17.3	22.4	24.6
Same state	10.2	7.7	10.6	10.8	11.5
Different state	9.1	5.1	6.7	11.6	13.1
Northeast	1.9	2.7	0.8	2.2	1.9
North Central	2.4	0.6	3.0	2.6	3.2
South	2.9	1.3	1.8	5.2	2.4
West	2.0	0.5	1.2	1.6	5.5
Movers from abroad	1.9	1.8	1.0	1.6	3.6

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20 No. 368 (December 1981).

Data on a household basis indicate a trend to less mobility in recent years. A newly released report in the annual housing survey conducted by the Census Bureau for the U.S. Department of Housing and Urban Development showed that 18% of all households changed residences between October 1979 and 1980, down from 19% in 1979 and 20% in 1978. Recent movers comprised 23% of all households in the West

Mobility (continued)

in 1980 compared with 19% in the South, 16% in the North Central states, 13% in the Northeast.

Recent-mover homeowners reported higher family incomes (a median of $21,900) compared with all homeowners ($19,800), and their new properties were valued at a median of $60,400 compared with $51,300 for all homeowners.

The current unemployment rate may have caused a rise in population mobility, as past experience has shown that mobility status varies by labor force status. Data for 1980 showed a 56% mobility rate among civilians who were not employed vs. 49% for the employed. Persons not in the labor force have much lower mobility rates than either of these groups (35%).

Mobility status also varies among occupation groups. Farm workers have the lowest rate; professional workers have a higher rate than that of other nonfarm workers. Between 1975 and 1980, blacks and whites changed residence at about the same rate (45% and 46%, respectively). However, blacks tend to move shorter distances than whites, tending to stay in the same county to a greater extent.

MARRIAGES & MARITAL STATUS

For the sixth consecutive year, marriages registered an increase in 1981, reaching a total of 2,438,000. This was 25,000 more than the previous record high reported for 1980. In the first 10 months of 1982 the number of marriages showed an increase of 3.0% compared with the same 1981 period. The marriage rate rose from 10.8 in the 1981 period to 11.0 per 1,000 population.

The rate for the year 1981 was 10.6 per 1,000 population. This was also the rate in 1980, which had ended a decade in which the marriage rate slowly moved downward from a peak in 1972 and gradually reversed direction and started to climb in 1978.

Marriages & Marriage Rates in the U.S.
(Selected Years, 1960 - 1981)

Year	Number	Rate per 1,000 of Total Population
1981(p)	2,438,000	10.6
1980(p)	2,413,000	10.6
1979	2,359,000	10.7
1977	2,178,367	10.1
1976	2,154,807	10.0
1975	2,152,662	10.1
1970	2,158,802	10.6
1965	1,800,000	9.3
1960	1,523,000	8.5

(p) provisional

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics,
Monthly Vital Statistics Report.

MARRIAGES & MARITAL STATUS

The proportion of the adult population that has never married has increased greatly in the past 12 years. The percentage of women 25 to 29 years old who had never married doubled from 11% in 1970 to 23% in 1982, while the percentage of never-married men in the same age group was up from 19% to 36%.

Although most young men and women are expected to marry eventually, they are delaying marriage compared with their counterparts 12 years ago. It is not yet possible to determine the duration or permanence of the postponement. Better job opportunities for women are certainly a factor in the postponement. Current economic conditions and scarcity of affordable housing may also be factors.

Distribution of Single (Never Married) Population by Age Group
(Noninstitutionalized Population)

	Females			Males		
	1982	1980	1970*	1982	1980	1970*
Total 15 years & older	22.5%	22.5%	22.1%	29.7%	29.6%	28.1%
15 to 19 years	92.0	91.2	90.3	97.5	97.3	97.4
20 to 24 years	53.4	50.2	35.8	72.0	68.8	54.1
25 to 29 years	23.4	20.9	10.5	36.1	33.1	19.1
30 to 34 years	11.6	9.5	6.2	17.3	15.9	9.4
35 to 39 years	6.4	6.2	5.4	10.0	7.8	7.2
40 to 44 years	4.7	4.8	4.9	7.4	7.1	6.3
45 to 54 years	4.1	4.7	4.9	5.4	6.1	7.5
55 to 64 years	4.2	4.5	6.8	4.6	5.3	7.8
65 years & over	5.6	5.9	7.7	4.4	4.9	7.5

* Figures for 1970 include persons age 14.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 376 (October 1982)

Divorce

The rise in the number of divorced persons in the population has been a major marital status phenomenom in American society. The increased rate of divorce is measured by the divorce ratio, i.e, the number of divorced persons per 1,000 who are married and living with their spouse. As of March 1981 the ratio stood at 109, which was more than double the ratio of 47 in 1970. Women had a higher ratio than men (129 vs. 88) in 1981, reflecting the fact that men are more likely to remarry, and do so more quickly, after divorce than women. The divorce ratio for blacks (233) was higher than for whites or for Hispanics. The ratio for black women was particularly high at 289.

Perhaps a reflection of economic conditions, the number of divorces in 1982 fell below the 1981 level. In the January-October 1982 period there were 980,000

Divorce (continued)

divorces, a 3.5% decline compared with the number in the same period of 1981. The divorce rate in this period declined from 5.3 per 1,000 population in 1981 to 5.1 in 1982, according to the National Center for Health Statistics.

HOUSEHOLDS & FAMILIES

According to the Current Population Survey conducted by the U.S. Bureau of the Census, there were 83.5 million households in the United States in March 1982 compared with 80.8 million in 1980 and 63.4 million in 1970. Of the total, 61 million were family households (that is, containing a group of two or more related persons), registering a gain of almost 32% in 1982 compared with 1970. Families headed by a female householder (no husband present) showed a sharper rise--71%.

Data for 1982 showed a continued increase in the household population living in other than married-couple households--representing 12% of the total in 1982 compared with 7% in 1970. Another 15% of the household population lived in family households maintained by a man or woman with no spouse present, compared with 11% in 1970.

Most of the nonfamily households (86%) consist of individuals living alone. These represented 23% of all households in 1982, up from 17% in 1970. However, people living alone accounted for only about 9% of the total number of people counted in households of all types compared with 6% in 1970.

The dramatic increase in nonfamily households (up 71% in 1982 compared with 1970) and particularly of single-person households (up 78%) is reflected in the reduction in the average household size. This has declined from 3.67 persons in 1940, 3.06 in 1972, down to 2.72 in 1982.

The average population per family reached 3.25 in 1982, compared with 3.53 in 1972, 3.76 in 1940. Major factors which have contributed to the radical change in household/family size include the rise in the incidence of separation and divorce, postponement of marriage by young adults, and an increase in the number of elderly persons who maintain their own homes.

Households & Families by Size & Type
(Numbers in Thousands)

	1982		1980		1970		% Change
	Number	%	Number	%	Number	%	1982/1970
Households, total	83,527	100.0%	80,776	100.0%	63,401	100.0%	+ 31.7%
Family households	61,019	73.1	59,550	73.7	51,456	81.2	+ 18.6
Married-couple family	49,630	59.4	49,112	60.8	44,728	70.5	+ 11.0
Male householder, no wife present	1,986	2.4	1,733	2.1	1,228	1.9	+ 61.7
Female householder, no husband present	9,403	11.3	8,705	10.8	5,500	8.7	+ 71.0

(continued)

Households & Families by Size & Type
(Numbers in Thousands)
(continued)

	1982		1980		1970		% Change
	Number	%	Number	%	Number	%	1982/1970
Nonfamily households	22,508	26.9%	21,226	26.3%	11,945	18.8%	+ 88.4%
Male householder	9,457	11.3	8,807	10.9	4,063	6.4	+132.8
Female householder	13,051	15.6	12,419	15.4	7,882	12.4	+ 65.6
Living alone	19,354	23.2	18,296	22.7	10,851	17.1	+ 78.4
Families total	61,019	100.0	59,550	100.0	51,586	100.0	+ 18.3
Married couple	49,630	81.3	49,112	82.4	44,755	86.8	+ 10.9
Male head, no wife present	1,986	3.3	1,733	2.9	1,239	49.5	+ 60.3
Female head, no husband present	9,403	15.4	8,705	14.6	5,591	2.4	+ 68.2
Average Size (number)							
All households	2.72		2.76		3.14		
Families	3.25		3.29		3.58		

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 376 (October 1982).

Of the 49.3 million married-couple families in the population in 1981, about 82% had own children under 18 years of age. In 1970, 87% of the 44.7 million married-couple families had own children under 18. A striking development has been the increase in households headed by women who have their own children under 18. These represented 15.1% of family households in 1981--up from 10.7% of the 1970 total.

In the 1980's the number of households is expected to increase to about 97 million. Average family size will decline, with one- and two-child families more prevalent. Currently, average household size is 2.8. It is expected to decline to 2.5 persons by the end of the decade. The elderly population (65 and over) will account for both an increasing share of the population and of new households in coming years.

Regional Distribution

The fastest growth in the number of households has been in the West, which registered a 17.3% increase between 1975 and 1982. However, about one-third of the U.S. households are in the South--the biggest concentration, with the North Central region ranking second.

Regional Distribution (continued)

Number of Households by Geographic Region in the U.S., 1975, 1981
(Number in Thousands)

	Total		% Distribution		% Change
	1981	1975	1981	1975	1981/1975
Households, U.S. total	82,368	72,867	100.0%	100.0%	+ 13.0%
Northeast	17,781	16,427	21.6	22.5	+ 8.2
North Central	21,200	19,256	25.7	26.4	+ 10.1
South	27,220	23,407	33.0	32.1	+ 16.3
West	16,167	13,777	19.6	18.9	+ 17.3

Source: U.S. Bureau of the Census, Current Population Reports, (P-20; Nos. 311, 371).

LIVING ARRANGEMENTS

Two noteworthy trends which have developed in the U.S. in recent years are the increase in the number of people living alone and in the number of unmarried-couple households.

In 1982 single-person households numbers 19,354,000, representing 23.2% of all U.S. households. This was a gain of 78% over the 1970 total of 10,851,000 single-person households, which represented 17.1% of the total that year. The postponement of marriage, the increasing divorce rate and the declining death rate are all factors in this development.

The fastest-growing segment of the single populace is male, although women accounted for about 62% of those living alone in 1981. Among women living alone, 17.9% were under 35 years of age in 1981 compared with about 42% of the men living alone who were under 35. The elderly who live alone are primarily women. Among women living alone, almost 52% were 65 years of age or older compared with 20% of the men in 1981.

Persons Living Alone, by Marital Status, Age & Sex: 1970, 1981
(Numbers in Thousands)

	1981				1970				% Change 1981/1970	
	Male		Female		Male		Female			
	No.	%	No.	%	No.	%	No.	%	Male	Female
Total living alone	7,253	100.0%	11,683	100.0%	3,532	100.0%	7,319	100.0%	105.4	59.6
Marital status:										
Married, spouse absent	950	13.1	654	5.6	486	13.8	473	6.5	95.5	38.3
Widowed	1,124	15.5	6,566	56.2	940	26.6	4,716	64.4	19.6	39.2
Divorced	1,908	26.3	1,799	15.4	688	19.5	798	10.8	177.3	125.4
Single	3,271	45.1	2,664	22.8	1,418	40.1	1,340	18.3	130.7	98.8

(continued)

Persons Living Alone, by Marital Status, Age & Sex: 1970, 1981
(Numbers in Thousands)
(continued)

	1981				1970				% Change 1981/1970	
	Male		Female		Male		Female			
	No.	%	No.	%	No.	%	No.	%	Male	Female
Age:										
Under 25 yrs.	899	12.4%	748	6.4%	275	7.8%	282	3.9%	226.9%	165.2%
25 to 34 yrs.	2,140	29.5	1,344	11.5	533	15.1	358	4.9	301.5	275.4
35 to 44 yrs.	1,044	14.4	608	5.2	399	11.3	313	4.3	161.7	94.2
45 to 64 yrs.	1,712	23.6	2,955	25.3	1,151	32.6	2,470	33.7	48.7	19.6
65 yrs. & over	1,458	20.1	6,028	51.6	1,173	33.8	3,897	53.2	24.3	54.7

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 372

The number of unmarried couples living together has more than tripled in the last 10 years, reaching a total of 1,863,000 in 1982. This represented somewhat less than 4% of all couples (married and unmarried) in the U.S., double the number five years ago. In about 81% of the unmarried-couple households, one or both partners were under age 35. Most of the persons in this type of household were in the same age group as their partners.

About 72% of such households contain no children. Some half million have at least one child, according to the March 1981 Current Population Survey. Counting both children and adults, more than four million Americans now live in a household that includes two unmarried adults of the opposite sex.

The trend toward cohabitation appears to represent a new wave of household relationships that may become entrenched as a way of life if growth continues through this decade at the same pace as in the past decade. However, there is expectation that in the last half of the 1980's and through the 1990's families should increase in number a little faster than unrelated individuals for the first time in decades, with the share of consumer units headed by families stabilizing at about 67%.

Another striking development in living arrangements has been the great increase in the number of children living with only one parent, reaching 12.6 million in 1981 for a gain of 54% compared with 1970. While the number of children under 18 years old has declined, the proportion affected by separation and divorce has increased. Over 20% of all children lived in one parent situations in 1981 compared with less than 12% in 1970, in most cases with their mothers.

LIVING ARRANGEMENTS

Living Arrangements of Persons Under 18 Years Old: 1981 & 1970

(Excludes persons under 18 years old who were maintaining families or subfamiles)
(Numbers in Thousands)

	All Races			Black	
	1981	1970	% Change 1981/1970	1981	% of all races
Living arrangements					
Children under 18	62,918	69,162	- 9.0%	9,400	14.9%
Living with --					
Two parents	48,040	58,939	- 18.5	4,016	8.4
One parent	12,619	8,199	+ 53.9	4,310	34.2
Mother only	11,416	7,451	+ 53.2	4,074	35.7
Divorced	4,912	2,296	+113.9	982	20.0
Married	3,540	3,234	+ 9.5	1,492	42.1
Separated	3,112	2,332	+ 33.4	1,385	44.5
Widowed	1,158	1,395	- 17.0	355	30.7
Single (never married)	1,807	527	+242.9	1,245	68.9
Father only	1,203	748	+ 60.8	236	19.6
Divorced	614	177	+246.9	66	10.7
Married	296	287	+ 3.1	79	26.7
Separated	261	152	+ 71.7	65	24.9
Widowed	181	254	- 28.7	40	22.1
Single (never married)	112	30	+273.3	50	44.6
Other relatives only	1,911	1,547	+ 23.5	1,013	53.0
Nonrelatives only	348	477	- 27.0	61	17.5

Source: U.S. Bureau of the Census, *Current Population Reports*, Series P-20, No. 374.

SCHOOL ENROLLMENT

During the next decade pre-primary and elementary school enrollment will surge, and secondary enrollment will continue to decline.

SCHOOL ENROLLMENT

Projected Enrollment in Educational Institutions, 1981-1990

Year	Total*	Pre-primary	Grades 1 to 8	Grades 9 to 12
1981(r)	59,747	5,205	27,867	14,233
1982	59,388	5,372	27,613	13,783
1983	59,022	5,584	27,383	13,542
1984	58,877	5,859	27,133	13,534
1985	58,931	6,127	27,015	13,615
1986	59,365	6,379	27,369	13,497
1987	59,883	6,585	27,988	13,217
1988	60,275	6,683	28,658	12,836
1989	60,907	6,772	29,438	12,558
1990	61,699	6,877	30,298	12,423

(r) revised
*Total also includes higher education students.

Source: National Center for Education Statistics, The Condition of Education (1982 Edition).

The current level of enrollment in school, reported at 59.4 million, is one million less than the total for the year 1970. The total is not expected to hit the 60.0 million market for another five years.

Enrollment in pre-primary grades, however, is expected to grow as it has in recent years. Between 1970 and 1981, the nursery school enrollment increased rapidly due to growing recognition of the value of pre-primary education, as well as the growth of employment of women with young children. The rise in the number of births, of course, also will bring an increase in enrollment in the lower grades in the next few years.

In 1970, the number of men enrolled in college was larger than the number of women in every age group. By 1981, however, the number of women enrolled increased by 128%, while male enrollment grew by 22%. As a result, female students outnumbered their male counterparts in every age group except in the 20-to-29 year old span.

College enrollment of single women 18 to 24 years old more than tripled from 1960 to 1980. Another development was the sharp increase in enrollment for part-time attendance by older women. In general, in the 1980's fewer college students will come from the 18-to-24 year age group, more from the 25-to-64 group.

SCHOOL ENROLLMENT

College Enrollment by Full-Time Status
(Numbers in Thousands)

College-Enrolled By Sex & Age	1981		1980		1970	
	Total	% Full-time	Total	% Full-time	Total	% Full-time
Male, total 14 & over	5,825	68.6%	5,430	69.4%	na	na
Under 20 years	1,546	90.7	1,465	91.6	1,476	95.5%
20 to 24 years	2,383	80.8	2,235	81.9	1,985	83.8
25 & over*	1,895	35.2	1,730	34.6	940*	42.9*
Female, total 14 & over	6,303	60.9	5,957	60.1	na	na
Under 20 years	1,730	91.4	1,718	90.6	1,378	92.6
20 to 24	2,147	74.5	2,060	73.4	1,226	73.5
25 & over*	2,425	27.0	2,180	23.5	409	26.6

na = not available
* Covers age 25 to 34 years only.

Source: U.S. Bureau of the Census, Current Population Reports (Series P20, No. 374).

EDUCATIONAL ATTAINMENT

The current population of young adults has completed substantially more years of school than members of the older generation. Survey results show that about 86% of persons 25 to 34 years of age in 1981 were high school graduates, but among persons 55 to 64 only 63% had completed high school. The difference was much greater among blacks: 76% of the young adults had completed high school, only 32.5% of the older group.

The proportion of persons 25 years old and over who completed at least one year of college was greater for men than women in both 1970 and 1981. In 1970, about 25% of men as compared with 18% of women had attained this level while in 1981 37% of men and 28% of women had completed one year of college.

In 1970, blacks 25 to 34 years old were much less likely than their white counterparts to have completed at least one year of college; 15% for blacks, compared with 31% for whites. By 1981, the proportionate difference had declined as the figures had increased to 34% for blacks and 46% for whites. In the same age group in 1981 the proportion of blacks who had completed one to three years of college was about the same as whites in 1981 (about 22%), but the proportion who had completed four or more years of college was 12% for blacks compared with 24% for whites.

EDUCATIONAL ATTAINMENT

Years of School Completed by the Population 25 Years Old & Over, By Age, Sex, Race, & Spanish Origin: March 1980 & 1970

(Numbers in Millions)

Age, sex, race, Spanish origin, & region	1981				1970			
		Percent				Percent		
ALL RACES	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More
Both sexes, 25 years & over	132.9	69.7%	32.1%	17.1%	109.3	55.2%	21.2%	11.0%
25 to 34 years	37.8	85.6	44.9	23.2	24.9	73.8	29.8	15.8
35 to 44 years	26.2	79.0	37.6	21.5	23.0	64.3	23.8	12.8
45 to 54 years	22.5	69.6	28.8	15.8	23.3	58.2	20.1	10.0
55 to 64 years	21.7	62.6	23.8	12.0	18.4	43.8	17.2	8.7
65 years & over	24.7	41.8	17.3	8.5	19.7	28.3	12.6	6.3
Male, 25 years & over	62.5	70.3	36.7	21.1	51.8	55.0	24.9	14.1
25 to 34 years	18.6	86.1	48.6	26.1	12.2	74.3	34.8	19.7
35 to 44 years	12.8	79.1	42.5	26.2	11.2	63.7	29.0	17.2
45 to 54 years	10.8	68.3	33.8	20.6	11.2	57.0	23.9	13.0
55 to 64 years	10.1	61.8	28.3	16.3	8.7	42.0	18.1	9.9
65 years & over	10.1	40.8	19.1	11.0	8.4	25.9	13.4	7.9
Female, 25 years & over	70.4	69.1	28.1	13.4	57.5	55.4	18.0	8.2
25 to 34 years	19.2	85.2	41.3	20.4	12.6	73.3	25.0	12.0
35 to 44 years	13.4	78.9	32.8	17.0	11.8	64.9	18.9	8.7
45 to 54 years	11.7	70.8	24.1	11.3	12.1	59.4	16.6	7.3
55 to 64 years	11.6	63.2	19.8	8.3	9.7	45.4	16.3	7.6
65 years & over	14.6	42.5	16.1	6.8	11.3	30.1	11.9	5.2
WHITE								
Both sexes, 25 years & over	116.6	71.6	33.1	17.8	98.1	57.4	22.3	11.6
25 to 34 years	32.5	86.9	45.9	24.3	21.9	76.1	31.2	16.6
35 to 44 years	22.7	80.7	38.9	22.5	20.4	66.9	25.0	13.6
45 to 54 years	19.7	72.6	30.0	16.6	21.0	61.2	21.2	10.6
55 to 64 years	19.5	65.8	25.1	12.8	16.7	46.5	18.2	9.1
65 years & over	22.3	44.2	18.4	9.0	18.1	29.9	13.3	6.7
Male, 25 years & over	55.2	72.1	38.0	22.2	46.6	57.2	26.2	15.0
Female, 25 years & over	61.4	71.2	28.0	13.8	51.5	57.6	18.6	8.6
BLACK								
Both sexes, 25 years & over	13.3	52.9	21.2	8.2	10.1	33.7	10.3	4.5
25 to 34 years	4.3	75.9	34.1	11.7	2.7	53.4	15.0	6.1
35 to 44 years	2.8	64.1	23.1	9.1	2.3	41.6	12.2	5.2
45 to 54 years	2.3	44.9	17.2	7.9	2.1	29.1	9.3	3.8
55 to 64 years	1.9	32.5	10.3	4.3	1.5	17.0	6.3	3.8
65 years & over	2.1	17.6	6.5	3.5	1.4	9.0	4.4	2.0
Male, 25 years & over	5.8	53.2	22.1	8.2	4.6	32.4	10.2	4.6
Female, 25 years & over	7.4	52.6	20.5	8.2	5.5	34.8	10.4	4.4

(continued)

EDUCATIONAL ATTAINMENT

Years of School Completed by the Population 25 Years Old & Over, By Age, Sex, Race, & Spanish Origin: March 1980 & 1970

(Numbers in Millions)
(continued)

Age, sex, race, Spanish origin, & region	1981				1970			
		Percent				Percent		
SPANISH ORIGIN*	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More
Both sexes, 25 years & over	6.3	44.5%	18.2%	7.7%	3.9	32.1%	11.0%	4.5%
25 to 34 years	2.4	56.9	24.4	8.8	1.3	44.5	14.6	5.4
35 to 44 years	1.5	48.0	18.2	8.2	1.1	33.6	11.7	5.1
45 to 54 years	1.0	38.7	17.6	9.0	1.2	23.8	8.3	3.8
55 to 64 years	0.8	27.3	9.8	5.1				
65 years & over	0.6	17.0	4.8	2.8	0.4	13.4	5.4	2.5
Male, 25 years & over	3.0	45.5	21.0	9.7	1.9	33.4	13.5	5.9
Female, 25 years & over	3.3	43.6	15.8	5.9	2.1	31.0	8.7	3.2

na = not available
*Persons of Spanish origin may be of any race.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374.

LABOR FORCE, EMPLOYMENT & EARNINGS

Changes in the age composition of the population are reflected in the growing rate of participation in the labor force. In the year 1981 an average 64.3% of the U.S. noninstitutional population 16 years and over was in the total labor force (including the Armed Services). This compares with 61% in 1971, 60.2% in 1961. By the end of 1982 over 113 million people were in the total labor force; over 111 million of these were counted in the civilian labor force. Both of these were record highs, comparing with the previous peak of 110.8 million in the total labor force in 1981, 108.7 million in the civilian labor force.

Labor Force Profile, 1979-1981, November 1981 & November 1982

(Thousands of persons 16 years of age & over)

	November*		Annual Average		
	1982	1981	1981	1980	1979
Total noninstitutional population, 16 years & older	175,238	173,155	172,272	169,848	166,951
Total labor force**	113,199	111,430	110,812	109,042	107,050
% of population	64.6%	64.4%	64.3%	64.2%	64.1%

(continued)

Labor Force Profile, 1979-1981, November 1981 & November 1982
(Thousands of persons 16 years of age & over)
(continued)

	November*		Annual Average		
	1982	1981	1981	1980	1979
Civilian labor force	111,019	109,272	108,670	106,940	104,967
Employed, total	99,086	100,172	100,397	99,303	98,824
Agricultural	3,470	3,372	3,368	3,364	3,347
Nonagricultural	95,616	96,800	97,030	95,938	95,477
Unemployed, total	11,987	9,100	8,273	7,367	6,137
% of civilian labor force	10.8%	8.3%	7.6%	7.1%	5.8%

* Seasonally adjusted
**Includes Armed Forces

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (December 1982)

The total number of people with civilian jobs as of December 1982 stood at just over 99 million, about 600,000 below the 1981 year-end figure. For the entire year 1982 civilian employment averaged about 99.5 million. This compares with 100.4 million for the year 1981 (which was a record high).

Projections on total employment compiled by the Bureau of Labor Statistics anticipate an employment level of between 119.6 million and 127.9 million workers by the year 1990.

Employment of the Civilian Labor Force, Annual Averages 1977-1981, November, 1982
(In Thousands)

Year	Civilian Labor Force	Employment		
		Total	Male	Female
1977	99,009	92,017	54,728	37,289
1978	102,251	96,048	56,479	39,569
1979	104,962	98,824	57,607	41,217
1980	106,940	99,303	57,186	42,117
1981	108,670	100,397	57,397	43,000
November 1982*	111,019	99,032	55,863	43,169

* Seasonally adjusted

Source: U.S. Bureau of Labor Statistics.

The influx of women into the work force, which got underway in the 1970's, has continued. Women accounted for three-fifths of the increase in the civilian labor force in the last decade--more than 13 million women compared with nearly 9 million men.

LABOR FORCE, EMPLOYMENT & EARNINGS

In 1981, 46.7 million women were in the civilian labor force. This represented 52% of the total female noninstitutional population 16 years of age and older, and accounted for 43% of the total civilian labor force. In 1972, 33.5 million women were in the civilian labor force, representing 38.5% of that total, and about 44% of the total population.

Labor force participation rates for women are almost equal on the basis of race/ethnic origin: 53% for black women in 1981 (5.4 million women), 52% for white women (40.2 million) and 48% for Spanish-origin women (2.2 million).

More than one-fourth (28%) of all women workers held part-time jobs in 1981. Most (78%) were employed part-time on a voluntary basis. About 66% of all part-time workers were women.

The majority of women work because of economic need. Two-thirds (66%) of all women in the labor force in March 1982 were single or had husbands whose earnings in 1981 were less than $15,000 (21%). However, the more education a woman has the greater the likelihood that she will seek paid employment. Among women with four or more years of college 58% were in the labor force in 1981. In March 1981 the median years of schooling was the same for both the average women and the average man worker--12.7 years.

Latest available monthly data (not seasonally adjusted) on employment of men and women by age is noted below.

Employment Status of the Noninstitutional Population
By Sex & by Age, November, 1982
(Numbers in Thousands)

	In Total Labor Force*			Unemployed		Not in Labor Force	
	Number	% of Population In Each Age Group	In Civilian Employment	Number	% of Civilian Labor Force	Number	In School** Number
Men							
16 yrs. & older	64,373	76.3%	56,203	6,172	9.9%	19,424	4,921
16-19	4,415	54.9	3,147	1,035	24.7	3,633	3,277
20-24	9,283	85.2	7,123	1,380	16.2	1,619	1,174
25-54	41,626	94.2	37,346	3,298	8.1	2,558	462
55-64	7,023	70.4	6,827	374	5.2	3,028	8
65 & over	1,846	17.7	1,760	85	4.6	8,586	--
Women							
16 yrs. & older	48,582	53.2	43,622	4,771	9.9	42,639	4,792
16-19	3,947	50.4	3,036	889	22.6	3,886	3,160
20-24	7,558	70.0	6,439	1,027	13.8	3,234	1,017
25-54	30,923	67.5	28,270	2,577	8.4	14,884	589
55-64	4,924	42.0	4,689	234	4.8	6,794	20
65 & over	1,231	8.1	1,187	43	3.5	13,890	5

*Includes civilian and military members of the labor force.

**Covers only those people who are in school who are not in the labor force. Many people in the labor force are, of course, also enrolled in school.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, (November, 1982).

LABOR FORCE, EMPLOYMENT & EARNINGS

The number of working mothers has increased more than tenfold since 1940, while the the number of working women more than tripled. Of all mothers with children under 18 years of age (18.7 million), 59% were in the labor force in March 1982; 50% of mothers with preschool children (7.4 million mothers) were working.

Putting it another way, about 55% of all children under age 18 (32 million) had working mothers as of March 1982; 46% of all children under 6 (8.5 million) had mothers in the labor force.

Unemployment

With the deepening recession in 1982, unemployment grew rapidly. According to preliminary figures issued by the Bureau of Labor Statistics, 10.8% of the civilian labor force, or over 12 million people, were looking for work as of December 1982. This compares with an unemployment rate of 8.8% at the end of 1981.

For the year 1982, unemployment averaged 9.7%, the highest rate since the 9.9% average registered in 1941. Economists anticipate further increases to 11% or higher in the jobless rate in the early months of 1983, an annual rate for the year that may be over 10%, and a rate of about 8.5% to 9.0% by the end of 1984.

Unemployment has continued to rise in the first quarter of every economic recovery since World War II. As economic conditions improve it is expected that many discouraged workers not currently counted in the labor force, since they are not actively looking for work, will resume looking. The economy, on the other hand, will not be able to accommodate all of the additional people seeking jobs. In the last quarter of 1982, over 1.8 million people were in the discouraged worker category--up from over 1.6 million in the previous quarter and the highest number since the Department of Labor began keeping these records in 1967. The average period a worker was jobless edged up to 18 weeks, the longest since the 1940's.

An encouraging sign, on the other hand, was that factory job losses slowed in December 1982 and factory hours held steady.

Unemployment (continued)

Unemployment, Annual Averages 1977-1981 & November 1982

	Total Unemployed		Males (16 & Older)		Females (16 & Older)	
Year	Number (Thous.)	% of Civilian Labor Force	Number (Thous.)	% of Civilian Labor Force	Number (Thous.)	% of Civilian Labor Force
1977	6.991	7.1	3,667	6.3	3,324	8.2
1978	6,202	6.1	3,142	5.3	3,061	7.2
1979	6,137	5.8	3,120	5.1	3,018	6.8
1980	7,637	7.1	4,267	6.9	3,370	7.4
1981	8,273	7.6	4,577	7.4	3,696	7.9
Nov. 1982*	11,906	10.7	6,660	10.7	4,816	9.9

* Seasonally adjusted annual rate. Preliminary figures for 1982 showed the unemployment total at over 12 million, the rate for the month at 10.8%.

Source: U.S. Bureau of Labor Statistics.

There is considerable variation in the seriousness of the problem of unemployment within the population. Unemployment is highest among blacks, particularly among young black women, 16 to 19 (42.2% in 1981); the least among white adult males, age 20 and over (5.6% in 1981). In December 1982 the rate for teenagers was 24.5%; the unemployment rate for blacks was 20.8%; for blue-collar workers, 16.3%; adult men, 10.1%, adult women, 9.2%.

Unemployment Rates by Sex, Age & Race, 1980, 1981, Seasonally Adjusted Quarterly Averages, 1982
(% of Labor Force Unemployed)

	1982			Annual Average		
	3rd Qtr.	2nd Qtr.	1st Qtr.	1981	1980	1979
All civilian workers	9.9%	9.5%	8.8%	7.6%	7.1%	6.0%
Men, 20 years & over	9.1	8.4	7.7	6.3	5.9	4.2
Women, 20 years & over	8.3	8.2	7.6	6.8	6.3	6.0
Both sexes, 16-19	23.9	22.8	21.9	19.6	17.1	16.3
Race:						
White	8.8	8.4	7.7	6.7	6.3	5.2
Black & other	17.7	17.1	15.9	15.5	14.1	12.6
Hispanic origin	14.2	13.2	13.0	10.5	10.1	9.1

Source: U.S. Bureau of Labor Statistics

Unemployment (continued)

Unemployment Rates by Occupation & Sex, 1980, 1981, November 1981, 1982

	Men				Women			
	November*		Annual Average		November		Annual Average	
	1982	1981	1981	1980	1982	1981	1981	1980
Total labor force, age 16 & over	10.7%	7.8%	7.4%	6.9%	9.9%	8.3%	7.9%	7.4%
White-collar workers	4.1	2.8	2.8	2.7	6.3	5.6	5.0	4.6
Professional, technical	3.2	2.2	2.2	2.0	3.9	3.4	3.4	3.0
Mgrs., admins., exc. farm	3.2	2.5	2.1	2.0	4.7	4.2	4.1	3.5
Sales workers	5.2	3.5	3.4	3.5	7.1	6.3	5.9	5.4
Clerical workers	7.4	4.4	5.1	4.8	7.6	6.7	5.9	5.4
Blue-collar workers	15.1	10.6	9.8	9.4	16.8	12.0	12.7	12.6
Service workers	11.6	9.5	9.2	8.1	10.5	9.5	8.6	8.6
Farm workers	7.7	6.5	4.5	3.7	10.3	7.9	8.1	8.1

*Not seasonally adjusted.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Employment by Industry & Occupation

Service-producing jobs, rather than goods-producing, have been showing the fastest rate of growth in recent years. In 1981, service-producing occupations accounted for 72% of all employees on nonagricultural payrolls compared with 70.5% in 1979. As of November 1982 their share had risen to 74%. (Not included in the following table are proprietors, self-employed persons, domestic servants and agricultural workers. These are, however, included in total civilian employment data.)

Employees on Nonagricultural Payrolls by Industry Division, 1979-1981, November 1982, 1981 (In Thousands)

	November (p)		%	Annual Averages		
	1982	1981	Change	1981	1980	1979
Total	88,715	90,996	- 2.5%	91,105	90,406	89,823
Goods-producing, total	23,086	25,176	- 8.3	25,481	25,658	26,461
Mining	1,051	1,202	-12.6	1,132	1,027	958
Construction	3,850	4,071	- 5.4	4,167	4,346	4,463
Manufacturing	18,185	19,903	- 8.6	20,173	20,285	21,040
Service-producing	65,629	65,820	- 0.3	65,625	64,748	63,363
Transportation & public utilities	5,009	5,150	- 2.7	5,157	5,146	5,136
Wholesale trade	5,232	5,375	- 2.7	5,359	5,275	5,204
Retail trade	15,156	15,248	- 0.6	15,192	15,035	14,989
Finance, insurance, real estate	5,364	5,324	- 0.7	5,301	5,160	4,975
Services	19,127	18,815	+ 1.7	18,592	17,890	17,112
Government	15,741	15,908	- 1.0	16,024	16,241	15,947
Federal	2,726	2,749	- 0.8	2,772	2,886	2,773
State & local	13,015	13,159	- 1.1	13,253	13,375	13,174

(p) preliminary, seasonally adjusted.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Employment by Industry & Occupation (continued)

Interest-rate sensitive industries, such as construction and automotive, were the first to be hit by the current recession, but by late 1981 the weakness had spread to much of the rest of the economy, including the services section. The deterioration in the labor market became more pervasive as slackening sales and growing inventories forced firms to curtail new orders, cutback production and layoff workers.

As of November 1982, total employees on nonagricultural payrolls numbered 88.7 million. This was 2.5% below the total of 91.1 million a year earlier. Employment in the goods-producing area was down 8.3%; in service-producing, down 0.3%.

In 1981, 42.9% of all male workers were white collar workers, compared with 39.8% in 1972. Comparable figures for female workers were 65.9% and 60.9%, respectively. Overall, 44.8% of civilian employment was in the white-collar classifications. According to Bureau of Labor Statistics projections more than half of the U.S. labor force will be in white-collar occupations, with growth fastest in professional and technical occupations.

According to the Women's Bureau of the U.S. Department of Labor, women continue to constitute a large proportion of workers in traditional occupations. They were 80% of all clerical workers in 1981 but only 6% of all craft workers; 62% of service workers but only 45% of professional and technical workers; 63% of retail sales workers, only 28% of nonfarm managers and administrators.

Employment by Industry & Occupation, by Sex

Industry of the Employed, by Sex, Annual Averages, 1972, 1981
(In Thousands)

	1981		1972	
	Male	Female	Male	Female
Total employed, 16 years & over	57,397	43,000	50,630	31,072
Agriculture, forestry, etc.	2,824	694	2,941	644
Mining	949	170	556	41
Construction	5,566	494	4,955	291
Manufacturing, total	14,906	6,911	14,296	5,570
Durable goods	9,798	3,368	9,228	2,340
Nondurable goods	5,108	3,543	5,068	3,230
Food & kindred products	1,262	518	1,272	454
Textile mill products	366	377	509	435
Apparel & other finished textile products	277	985	307	1,096
Printing, publishing, allied industries	927	667	803	416
Chemicals & allied products	929	356	848	252
Other nondurable goods	1,346	640	1,324	576

(continued)

Employment by Industry & Occupation, by Sex (continued)

Industry of the Employed, by Sex, Annual Averages, 1972, 1981
(In Thousands)
(continued)

	1981		1972	
	Male	Female	Male	Female
Transportation, communication & other public utilities	4,875	1,758	4,336	1,126
Wholesale & retail trade	10,907	9,617	9,558	6,991
Wholesale trade	2,981	1,034	2,393	667
Retail trade	7,926	8,583	7,718	8,410
Dept. stores & mail order estabs.	618	1,485	666	1,371
Grocery stores	1,288	1,066	1,125	719
Motor vehicle dealers	691	125	729	93
Apparel, access. stores, excl. shoe stores	156	534	179	400
Eating & drinking places	1,885	2,729	1,161	1,708
Other retail trade	3,378	2,644	3,305	1,954
Financial, insurance, real estate	2,545	3,588	2,172	2,155
Service industries, total	11,477	17,884	8,722	13,027
Professional & related services (health, teaching, etc.)	6,936	13,265	5,404	9,050
Public administration	3,348	1,884	3,093	1,306

Source: U.S. Bureau of the Census
Current Population Reports,
Series P-20, No. 374.

Occupation of Employed Civilians by Sex, Annual Averages--1972, 1981
(In Thousands)

	1981		1972	
	Male	Female	Male	Female
Total employed, 16 years & over	57,397	43,000	50,630	31,072
Occupation:				
White-collar workers	24,607	28,341	20,175	18,915
Professional, technical & kindred	9,100	7,319	6,957	4,502
Engineers	1,470	67	1,093	9
Health workers	1,010	2,115	733	1,155
Teachers, except college & university	940	2,257	853	1,988
Other professional, technical & kindred	5,680	2,880	4,278	1,350
Managers & administrators, except farm	8,372	3,168	6,621	1,410
Salaried	6,904	2,672	5,242	1,064
Self-employed in retail trade	560	310	693	240
Self-employed, except retail trade	908	185	686	105

(continued)

Employment by Industry & Occupation, by Sex (continued)

Occupation of Employed Civilians by Sex, Annual Averages--1972, 1981
(In Thousands)

	1981		1972	
	Male	Female	Male	Female
Sales workers	3,509	2,916	3,127	2,226
Retail trade	1,191	2,072	1,207	1,900
Other industries	2,318	844	1,920	326
Clerical & kindred workers	3,626	14,938	3,470	10,777
Secretaries, stenographers & typists	82	4,939	79	4,016
Other clerical & kindred	3,544	9,999	3,391	6,761
Blue-collar workers	25,432	5,828	23,800	4,776
Craft & kindred	11,859	802	10,424	386
Construction craft	3,646	69	3,274	19
Mechanics & repairers	3,345	63	2,746	22
Metal craft	1,239	54	1,080	15
Blue-collar supervisors, n.e.c.	1,610	206	1,314	98
Other craft & kindred	2,020	410	2,009	232
Operatives, except transport	6,350	4,190	6,351	3,989
Durable goods manufacturing	3,035	1,570	3,130	1,284
Nondurable goods manufacturing	1,404	1,935	1,489	2,069
Other industries	1,911	685	1,732	636
Transport equipment operatives	3,167	309	3,075	134
Drivers, motor vehicles	2,681	285	2,620	130
Other transport equipment operatives	487	24	454	4
Laborers, except farm	4,056	527	3,950	267
Construction	781	16	872	4
Manufacturing	839	147	917	92
Other industries	2,437	363	2,162	171
Occupation:				
Farm Workers	2,260	490	2,526	543
Farmers & farm managers	1,317	168	1,588	100
Farm laborers & supervisors	943	322	938	443
Service Workers	5,097	8,342	4,128	6,838
Service workers, except private household	5,059	7,332	4,094	5,435
Food service workers	1,581	3,101	986	2,277
Protective service workers	1,311	148	1,079	65
Other service workers, except private household	2,167	4,083	2,029	3,093
Private household workers	38	1,010	34	1,403

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 374

LABOR FORCE, EMPLOYMENT & EARNINGS

Full-time & Part-time Workers

Of 51.1 million men at work in nonfarm occupations in 1981, according to the Bureau of Labor Statistics, 88.7% were on full-time schedules, 11.2% were on part-time schedules--including 4.0% for economic reasons, 7.2% on a voluntary basis. Among 38.9 million women counted at work in 1981 in nonfarm occupations, 71.4% were on a full-time basis, 28.2% were on part-time--including 6.0% for economic reasons and 22.4% who were voluntarily on a part-time work schedule.

Earnings

In the third quarter of 1982, 41.1 million families--66% of all U.S. families--had earnings exclusively from wages or salaries. An additional 14% either had earnings solely from self-employment or combined self-employment with wage and salary earnings. Largely because of increased unemployment, the numbers of families with no earners rose by almost 800,000 over the year to 12.1 million.

The average workweek of production or nonsupervisory workers on private nonagricultural payrolls, at 34.7 hours in the January-November 1982 period, edged down from an average 35.2 hours in 1981, 35.3 hours in 1980. The downward drift was noted in all types of activities with the exception of financial, insurance and real estate and services, where the 1980 and 1981 levels were maintained in 1982.

The Labor Department reported that weekly earnings of U.S. workers averaged $272.14 in December 1982. The average was up 0.5% compared with November after adjustment for inflation and seasonal factors. Earnings in November 1982 rose 0.1% after declining for five consecutive months. For the year 1982, inflation-adjusted weekly earnings declined 0.1%. In 1981 these earnings fell 2.4%.

While many of the 3.6 million people covered by union contracts expiring in 1983 could get better-than-average increases, economists generally predict that the year's average hourly earnings gain will be close to 1982's 5.5%, which was the lowest since 1967. Many nonunion workers face prospects of smaller raises or bonuses.

Average Weekly Earnings & Hours of Production & Nonsupervisory Workers on Private Nonagricultural Payrolls, by Industry Division
(Includes both full-time & part-time workers)

	Average Weekly Earnings			Average Weekly Hours		
	Jan.-Nov. 1982	1981	1980	Jan.-Nov. 1982	1981	1980
Total	$266.07	$255.20	$235.10	34.7	35.2	35.3
Mining	460.29	439.19	397.06	42.6	43.7	43.3
Construction	422.95	398.52	367.78	36.7	36.9	37.0
Manufacturing	330.13	318.00	288.62	38.8	39.8	39.7
Transportation, public utilities	399.72	382.18	351.25	38.9	39.4	39.6
Wholesale & retail trade	198.34	190.95	176.46	31.9	32.2	32.2
Financial, insurance, real estate	244.87	229.05	209.60	36.2	36.3	36.2
Services	224.69	208.97	190.71	32.6	32.6	32.6

Source: U. S. Bureau of Labor Statistics

Earnings (continued)

For men working full-time, median weekly earnings in 1981 were $347. For women, the median was $224, or 65% of that for men. Among the factors involved in this difference, it is noted by the Bureau of Labor Statistics that men worked more hours than women, even within the full-time employment universe and, more importantly, were generally more concentrated within high-pay occupations, including such fields as management and administration, professional and technical work, and the various crafts. Women, on the other hand, tend to be more concentrated in such lower-paying fields as clerical and service jobs, despite the fact that the average woman worker is as well educated as the average man worker--both having completed a median of 12.7 years of schooling as of March 1982.

However, male-female gaps in earnings prevail even within each occupation. An analysis of Current Population Survey data by the BLS also shows that the average weekly earnings of women reach a peak at a younger age than do the earnings of men. Over the past 14 years, the overall sex-earnings ratio has changed very little. It was 62% in May 1967 and had risen only to 64% by the second quarter of 1981.

Median Weekly Earnings of Full-Time Wage & Salary Workers, Men & Women, by Age & by Occupation, 1981 Average
(All races)

	Total	Men	Women
Total, for workers 16 years & over	$289	$347	$224
16 to 24 years	204	225	134
25 years & over	316	378	237
25 to 34 years	302	346	242
35 to 44 years	335	406	241
45 to 54 years	329	408	231
55 to 64 years	317	386	227
65 years & over	227	270	190
Occupation:			
Professional/technical	377	439	316
Managers/administrators	407	466	283
Salesworkers	306	366	190
Clerical workers	233	328	220
Craft & kindred workers	352	360	239
Operatives, exc. transport	242	298	187
Transport equip. operators	303	307	237
Nonfarm laborers	238	244	193
Service workers	192	238	165
Farmworkers	179	183	148

Source: U.S. Bureau of Labor Statistics, *Monthly Labor Review* (April 1982)

Earnings (continued)

There is a wide difference in earnings among whites, blacks and Hispanics. In 1981, the overall median weekly earnings (full-time workers) of blacks were 80% of the overall median for whites; and the median for Hispanics was 77% of that for whites.

The greatest racial and ethnic difference in earnings were among men 25 years and over. Within this group, the medians for blacks and Hispanics were about 75% of that for whites. Among women, the racial-ethnic differences were much smaller.

In 1978, the median wage or salary income of women who worked was $5,358, as compared with a median of $12,092 for men. In 1980 the median for women was up 27%, reaching $16,804. The median for men rose 16.5%, reaching $14,091.

Size of Wage/Salary Income of Persons 15 Years Old & Over, 1980
(Number of persons in thousands, as of March 1981)

	Men		Women	
	Number	Percent	Number	Percent
Total with wage/salary income	60,140	100.0%	49,321	100.0%
Under $5,000/year	12,454	20.7	19,669	39.9
$ 5,000 - $ 9,999	8,927	14.8	13,536	27.4
$10,000 - $14,999	10,255	17.1	9,664	19.6
$15,000 - $24,999	17,585	29.2	5,658	11.5
$25,000 - $34,999	7,142	11.9	614	1.2
$35,000 & above	3,776	6.3	179	0.4
Median income	$14,091		$6,804	
Mean income	15,611		7,695	
Total with no wage/salary income (thousands)	22,808		41,812	

Source: U.S. Bureau of the Census,
Current Population Reports,
(Series P-60, No. 132) (July 1982).

The trend to multi-earner households was a major development in the 1970's, and by 1980 44% of all households in the U.S. had two or more wage or salary earners.

Number of Earners in U.S. Households, 1980

	Households		Median Earnings (Wages/Salaries)
	Number (000)	%	
Total households	82,368	100.0	
With earnings*	65,724	79.8	$ 18,913
Family households	60,309	73.2	20,867
Number of earners			
None	7,966	9.7	--
One	18,475	22.4	12,771
Two	25,160	30.5	22,791
Three	5,854	7.1	29,409
Four or more	2,854	3.5	36,448

(continued)

Earnings (continued)

Number of Earners in U.S. Households, 1980
(continued)

	Households		Median Earnings
	Number (000)	%	(Wage/Salaries)
Nonfamily households, total	22,059	26.8	$ 12,497
Number of earners			
None	8,476	10.3	--
One	11,064	13.4	11,325
Two	2,213	2.7	20,211
Three	254	0.3	27,592
Four or more	52	0.1	nr

nr - not reported
* Excludes those with no wage or salary earners and those in which the person maintaining the household is either self-employed or in the Armed Forces.

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-60, No. 132)

However, the high rate of unemployment prevailing in 1982 is reflected in a downturn in the number of families with two or more earners. In the second quarter of 1982, according to the Bureau of Labor Statistics, the number of such families declined 3.3% compared with the number in the same 1981 period. Families with two or more earners accounted for 45.8% of all families with earners in the second quarter of 1982, compared with 46.5% in the second quarter of 1981.

While median weekly earnings of all families with earnings in the 1982 period in terms of current dollars were up 5.7% compared with the second quarter 1981, on a constant dollar basis--eliminating the effects of inflation--the typical figure declined by 0.8%.

Number of Earners by Type of Family, Second Quarter 1982

	Number of Families, 2nd Qtr. 1982			Median Weekly Earnings		
					% Change/2nd Qtr. 1981	
	Thous.	% of Total	% Change/ 2nd Qtr. 1981	Current $	Current $	Constant $
Total families with earners*	40,931	100.0	- 1.8%	$455	+ 5.7%	- 0.8%
Married-couple families	33,235	81.2	- 2.2	500	+ 7.2	+ 0.6
One-earner	14,490	35.4	- 0.8	345	+ 4.0	- 2.5
Husband	11,426	27.9	- 4.0	393	+ 6.1	- 0.5
Wife	2,404	5.9	+17.4	201	+12.6	+ 5.6
Other family member	606	1.6	+11.3	190	+ 4.3	- 2.2
Two or more earners	18,746	45.8	- 3.3	618	+ 7.4	+ 0.8
Husband & wife	15,930	38.9	- 3.7	622	+ 7.6	+ 1.0
Husband & other family member(s)	2,235	5.5	- 1.3	646	+ 7.6	+ 1.0
Wife & other family member(s)	446	1.1	--	375	+ 1.8	- 4.5
Other family member(s) only	134	0.3	- 5.6	396	- 5.1	-11.0

(continued)

LABOR FORCE, EMPLOYMENT & EARNINGS

Earnings (continued)

Number of Earners by Type of Family, Second Quarter 1982
(continued)

	Number of Families, 2nd Qtr. 1982			Median Weekly Earnings		
	Thous.	% of Total	% Change/ 2nd Qtr. 1981	Current $	% Change/2nd Qtr. 1981 Current $	Constant $
Families maintained by females	5,891	14.4	+ 0.4%	$253	+ 5.0%	- 1.5%
One earner	4,185	10.2	--	207	+ 4.0	- 2.4
Householder (Hhld. head)	3,328	8.1	- 0.3	214	+ 5.5	- 1.0
Other family member	857	2.1	+ 1.1	185	+ 0.5	- 5.7
Two or more earners	1,706	4.2	+ 1.5	417	+ 6.3	- 0.2
Families maintained by males	1,805	4.4	- 0.7	419	+11.9	+ 5.0
One earner	1,098	2.7	- 4.9	346	+11.5	+ 4.6
Two or more earners	707	1.7	+ 6.8	556	+ 5.1	- 1.4

* Excludes families in which there are no wage or salary earners or where the person maintaining the family is either self-employed or in the Armed Forces.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (October 1982)

INCOME

Personal

The following table outlines personal income and spending in current dollars, as well as constant dollars (eliminating the effects of inflation), for the years 1980, 1981, and 1982.

Personal Income & Its Disposition, 1980-1982
(Billions of Dollars)

	1982(p)	1981	1980	Percent Change 1982/1981	Percent Change 1981/1980
Personal income	$2,569.7	$2,415.8	$2,160.4	+ 6.4%	+11.8%
Less: Personal tax & nontax payments	397.2	386.7	336.3	+ 2.7	+15.0
Equals: Disposable personal income	2,172.5	2,029.1	1,824.1	+ 7.1	+11.2
Less: Personal outlays	2,031.4	1,898.9	1,717.9	+ 7.0	+10.5
Personal consumption expends.	1,972.0	1,843.2	1,667.2	+ 7.0	+10.6
Durable goods*	242.7	234.6	214.3	+ 3.4	+ 9.5
Nondurable goods*	762.7	734.5	670.4	+ 3.8	+ 9.6
Services	966.6	874.1	782.5	+10.6	+11.7
Interest paid by consumers to business	58.6	55.1	49.9	+ 6.3	+10.4
Personal transfer payments to foreigners (net)	0.9	0.6	0.8	+50.0	-25.0
Equals: Personal saving	141.1	130.2	106.2	+ 8.4	+22.6

(continued)

Personal (continued)

Personal Income & Its Disposition, 1980-1982
(Billions of Dollars)
(continued)

	1982(p)	1981	1980	Percent Change 1982/1981	Percent Change 1981/1980
Addenda					
Disposable personal income:					
Total, bils. of 1972 dollars	1,055.0(e)	1,043.1	1,018.0	+ 1.1%	+ 2.5%
Per capita:					
Current dollars	9,362	8,827	8,011	+ 6.1	+10.2
1972 dollars	4,545(e)	4,538	4,471	+ 0.1	+ 1.5
Population (millions)	232.1	229.9	227.7	+ 1.0	+ 1.0
Personal saving as a % of disposable personal income	6.5	6.4	5.8	--	--
Personal consumption expenditures					
Total, bils. of 1972 dollars	957.3(e)	947.7	930.5	+ 1.0	+ 1.8
Durable goods	138.7(e)	140.0	137.1	- 0.9	+ 2.1
Nondurable goods	364.9(e)	362.4	355.8	+ 0.7	+ 1.8
Services	453.7(e)	445.2	437.6	+ 1.9	+ 1.7

(p) = preliminary (e) = estimated

* Durable goods is defined as goods which has a useful lifetime of three years or more; nondurable goods, less than three years.

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

The year 1982 was marked by a continuance of the recession which got underway in July 1981 with layoffs. Total personal income amounted to $2,570 billion, 6.4% over the 1981 total. This compares with an 11.8% rise in personal income in 1981 over 1980. The 1982 gain was the smallest since the 5.1% rise reported for the year 1963.

Disposable, or after-tax, income rose 7.1% in 1982 to $2,173 billion, after increasing 11.2% in 1981. Income from wages and salaries increased 4.4% in 1982, less than half the 10.2% rise for 1981 over 1980. This was the lowest yearly gain since the 2.8% in 1961. However, there was a 61% increase in Government payments for unemployment compensation--from about $15.4 billion in 1981 to $24.9 billion in 1982.

Personal consumption expenditures for all of 1982 were up 7% over the 1981 total. This compares with a 10.6% gain in spending in 1981, and it was the smallest annual gain since the 6.9% rise in 1970, according to the Department of Commerce.

Personal (continued)

Personal savings for the year 1982 rose 8.4%, to $141.1 billion, leaving a national saving rate of 6.5%, up from 6.4% in 1981. The rate measures new savings as a percentage of disposable income. For the month of December 1982 the savings rate was 5.8%, up from 5.5% the previous month.

Much of the increase in income reported for 1982 lies in transfer payments, which include Social Security and unemployment benefits. These represented 14.6% of total income in 1982, up from 13.9% in 1981. The fact that many people may exhaust unemployment benefits is a factor in the outlook for income levels in coming months, although extensions are being made in benefit periods.

Another factor in the outlook is the trend in interest rates which started downward in mid-1982. In 1971 interest income represented less than 3% of total personal income; by 1982 it accounted for 14.5%. Individuals have been the main beneficiaries of the runup in interest rates, but as rates decline they are likely to be the major losers. The bulk of their assets takes the form of time and savings deposits ($1.4 trillion outstanding at year end 1981) and money market funds, Treasury bills, and other short-term investments ($300 billion outstanding, according to the Morgan Guaranty Survey, December 1982).

The recent decline in interest rates (and a small further decline projected for 1983 by The Morgan Bank) means that interest income in 1983 is likely to be flat. A flat pattern would reduce the rate of total personal income growth more than one percentage point in the short term. (In the longer term, however, lower interest rates can be expected to stimulate employment and to generate wage and salary income.)

In addition to weaker interest earnings, many individuals in 1983 are likely to face rising interest expense. The average rate on outstanding mortgages in 1982 was still below 11%, but this will rise in 1983 as old, low-yielding loans are replaced by 12% and 13% mortgages.

Wages and salaries amounted to $1,506.1 billion in 1982. A gain of only 4.4% was registered over 1981 compared with a rise in wages and salaries of 10.2% in 1981 compared with 1980. Wage and salary disbursements have been taking a decreasing share of total personal income, dropping to 60.7% in 1982 compared with 63.8% in 1980.

With the inflation rate low and joblessness high, working Americans can expect another year of modest pay raises. Economists predict 1983's average hourly earnings gain will be close to last year's 5.5%, which was the lowest rate since 1967 and well below the 9.3% increase typical only two years ago. A lower rate, however, is an important factor in controlling inflation.

Personal (continued)

Distribution of Personal Income by Source, 1980-1982

	1982	1981	1980
Total personal income	100.0%	100.0%	100.0%
Wage & salary disbursement	60.7	61.8	62.8
Other labor income*	6.0	5.8	5.9
Proprietors' income			
Farm	0.7	1.0	0.9
Nonfarm	3.9	4.2	4.5
Rental income	1.3	1.4	1.5
Dividends	2.6	2.6	2.6
Personal interest income	14.5	13.6	12.2
Transfer payments (Social security, unemployment & other benefits)	14.6	13.9	13.8
Less: Personal contributions for social insurance	4.3	4.3	4.2

* Employer contributions to private pension, health and welfare funds; workmen's compensation, directors' fees and a few minor items.

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

In the month of December 1982, alone, wages and salaries represented less than 60% of total personal income; transfer payments accounted for 15.2%; personal interest income, 14.3%.

According to a U.S. Census Bureau survey, while income for males declined significantly in real terms (after adjustment for inflation) between 1979 and 1980, the incomes of females remained stable. In real terms, the median income for men decreased by 6.3% compared with 1979. Significant declines in real income were noted for men in the Northeast, North Central and South, while median income (constant dollars) in the West showed no significant change from 1979.

Women in the Northeast experienced a 3.7% decline in real median income, while women in the South showed a 4.2% increase in 1980 compared with 1979. Overall, as noted, there was practically no change.

The U.S. Census Bureau reports that nearly all (94.8%) males aged 15 and over had some money income in 1980, compared with 88.7% of females 15 and older. The age group 45-54 years had the largest percentage of their total number with incomes in the higher income bracket ($25,000 and above). This held true for both men and women, but among men 33.9% age 45-54 had money income of $25,000 or more; among women, only 3.2%.

The median income (current dollars) for men 15 years of age and over in 1980 was $12,530 compared with $11,845 in 1979, $6,670 in 1970. Comparable figures for women were $4,920, $4,354 and $2,237.

Personal (continued)

Distribution of the Population 15 Years of Age & Over By Total Money Income in 1980, by Sex & Age

Men	Total	Age Group 15-19	20-24	25-44	45-54	55 & over
Total (thous.)	82,949	10,140	10,300	31,431	10,839	20,238
Without income (thous.)	4,288	2,979	490	488	137	195
With income (thous.)	78,661	7,161	9,810	30,943	10,703	20,043
Income	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $5,000	21.4	82.7	30.6	8.7	8.7	21.2
$ 5,000 to $ 9,999	18.6	13.4	30.4	13.2	10.8	27.0
$10,000 to $14,999	17.1	3.0	22.4	19.5	15.0	17.0
$15,000 to $19,999	14.2	0.5	10.6	20.1	15.6	11.0
$20,000 to $24,999	11.3	0.3	4.3	16.6	16.0	8.1
$25,000 to $29,999	7.0	--	1.0	9.5	13.0	5.4
$30,000 & over	10.4	0.1	0.7	12.4	20.9	10.3
Women						
Total (thous.)	91,133	10,058	10,685	32,585	11,653	26,153
Without income (thous.)	10,307	3,278	1,088	3,246	1,272	1,421
With income (thous.)	80,826	6,780	9,596	29,338	10,381	24,731
Income	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $5,000	50.6	88.2	47.9	40.7	42.7	56.4
$ 5,000 to $ 9,999	24.3	10.0	33.2	24.0	24.7	24.9
$10,000 to $14,999	14.3	1.5	14.7	19.6	16.7	10.1
$15,000 to $19,999	6.4	0.1	3.2	9.6	9.0	4.5
$20,000 to $24,999	2.6	0.1	0.7	3.7	3.7	2.2
$25,000 to $29,999	0.9	--	0.2	1.2	1.4	0.9
$30,000 & over	1.0	--	0.1	1.2	1.8	1.0

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-60, No. 132 (July 1982).

INCOME

Personal (continued)

Median Total Money Income by Sex & by Age (15 Years & Over), 1980
Total With Money Income & Year-Round, Full-Time Workers

	Men & Women		Men		Women	
Age	Total	Full-Time Workers	Total	Full-Time Workers	Total	Full-Time Workers
Total	$ 7,944	$15,838	$12,530	$19,173	$ 4,947	$11,703
15 - 19 years	1,736	7,255	1,801	7,753	1,685	6,759
20 - 24	6,612	10,773	7,923	12,109	5,564	9,456
25 - 29	10,724	14,611	13,987	16,466	7,482	12,123
30 - 34	11,770	16,795	17,234	19,282	6,295	12,559
35 - 39	12,333	18,682	19,941	21,605	5,939	12,868
40 - 44	12,163	18,233	20,132	21,990	6,625	12,278
45 - 54	11,927	18,082	19,974	22,414	6,426	12,209
55 - 64	13,030	17,476	15,914	21,053	5,059	12,174
65 - 69	6,150	15,647	8,953	17,532	4,558	12,925
70 & over	4,872	14,963	6,545	16,712	4,341	11,937

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-60, No. 132
(July 1982)

Household

The average American household experienced a significant decline in real income between 1979 and 1980, according to the latest detailed information published by the Census Bureau based on the March 1981 Current Population Survey. The 1980 median household income of $17,710 was 7.6% over the 1979 median. However, after adjusting for a 13.5% increase in the cost of consumer goods, real median household income declined by 5.2% between 1979 and 1980. The 1980 median household income for whites was $18,650; for black households, $10,760; $13,650 for those of Spanish origin. All three groups showed real declines in income from 1979.

Data on households cover all persons who occupy a housing unit. Family data, on the other hand, cover a group of two or more persons who are related and residing together--one of these being the householder (formerly designated household head). The 1980 median family income was $21,020 in current dollars, up 7.3% compared with the 1979 median. However, after adjustment for inflation there was a net decline of 5.5% in real median family income. This represents the first statistically significant annual decline in real family income since 1974-1975 and the largest decline recorded in the post-World War II period. Median family income for 1980 was about $1,330 lower than the 1973 median ($22,350) in constant dollars.

A dollar in 1982 had only about 45% of the purchasing power that a dollar had in 1970. According to The Conference Board if a family had a $10,000 income in 1970 (which was then about average) it needed about $23,425 in 1982 to have the same after-tax real purchasing power it had then. The share of this hypothetical

Household (continued)

family's income taken by federal income taxes has risen from 9.9% in 1970 to 12% this year, while Social Security taxes have gone from 3.7% to 6.7%. (These calculations do not take into consideration any state-local taxes which vary greatly.)

A special study by the Census Bureau, released in September 1982 (Changing Family Composition and Income Differentials) concludes that changes in family composition, particularly the increasing proportion of families maintained by women with no husband present (up from 9% of the total in 1970 to 12% in 1980 for whites, from 31% to 42% for blacks), have resulted in declining income levels and increasing poverty rates for families. The study provides hypothetical estimates of the effect of the family composition changes on income and poverty levels. (For those concerned with such adjustments, see Census Bureau report, Special Demographic Analysis, CDS-80-7.)

More than 15% of the 82.3 million households in the U.S. in March 1981 had incomes of $35,000 or more, a much higher percentage than the 3.8% measured in 1975 and the 1.4% in 1970. These upper-income households accounted for 37% of all income flow to consumers.

The percentage of households in the lower income brackets (under $10,000) fell dramatically between 1970 and 1980, nose-diving from 57.7% to 27.5% of all households. Households with incomes under $15,000 represented more than 42% of all households in 1980, but accounted for only 16% of total income.

Distribution of Households by Total Money Income 1970, 1975, 1980

	1980	1975	1970
Total Households (thousands)	82,368	72,867	64,778
Percent	100.0%	100.0%	100.0%
Income (Current Dollars)			
Under $10,000	27.5	42.3	57.7
$10,000 - $14,999	14.5	20.5	23.2
$15,000 - $19,999	13.3	15.9	11.2
$20,000 - $24,999	12.2	9.6	3.9
$25,000 - $34,999	16.5	7.8	2.6
$35,000 & over	15.6	3.8	1.4
Median Income (current $)	$72,710	$11,800	$ 8,734
Mean Income (current $)	$21,063	$13,779	$10,001

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-60, No. 132 (July 1982)

In 1980, total aggregate money income of households in the U.S. amounted to $1,734.9 billion, 14% higher than the $1,522.1 billion registered in the previous year. Following a trend of the last several years the percentage of total income garnered by married-couple households has fallen between 1979 and 1980, down from 75.6% to 74.4%.

INCOME

Household (continued)

Households in the Western region of the U.S. had the highest income of any region of the country--$19,009, which was 7.3% above the national average. The Southern region was the only one to register a median household income below the national average, having a median income of $16,298.

Households headed by a college graduate account for 18.5% of the population but for 28.5% of the total income available to consumers.

Despite the slowing growth in the number of unrelated individuals, their incomes are projected to grow faster than family incomes, according to American Demographics. Average income for unrelated individuals should rise 34% between 1981 and 1995 (in 1981 dollars). The average income of families should rise 29%.

According to this source, in 1981, 50% of all unrelated individuals had incomes below $10,000. By 1995, this proportion should fall to 40% (in 1981 dollars). The share of unrelated individuals with incomes of $30,000 or more should rise from 5% in 1981 to 12% by 1995. Comparable figures for families indicate a rise from 35% of the total with incomes of $30,000 or more to 50%.

Number, Per Capita Income & Aggregate Money Income in 1980
Of Households by Selected Characteristics

	All Households		Av. # of Persons Per Hshld.	% of Aggregate Income	Per Capita Income
	Number (000)	%			
Total	82,368	100.0%	2.73	100.0%	$ 7,720
By region:					
Northeast	17,781	21.6	2.73	22.0	7,865
North Central	21,200	25.7	2.73	26.0	7,775
South	27,200	33.0	2.75	30.9	7,158
West	16,167	19.6	2.68	21.1	8,457
By marital status & sex of head:					
Male head	58,685	71.2	3.01	83.0	8,151
Married, wife present	47,473	57.6	3.35	71.8	7,823
Married, wife absent	1,440	1.8	1.61	1.5	11,253
Widowed/divorced	4,567	5.5	1.60	4.5	10,984
Single	5,205	6.3	1.53	5.2	11,220
Female head	23,684	28.8	2.03	17.0	6,135
Married, husband present	1,821	2.2	3.09	2.6	8,045
Married, husband absent	2,591	3.2	2.81	1.5	3,591
Widowed/divorced	14,457	17.6	1.84	9.3	6,048
Single	4,816	5.8	1.77	3.6	7,308

(continued)

Household (continued)

Number, Per Capita Income & Aggregate Money Income in 1980 Of Households by Selected Characteristics (continued)

	All Households Number (000)	All Households %	Av. # of Persons Per Hshld.	% of Aggregate Income	Per Capita Income
Size of household:					
One person	18,936	23.0%	1.00	12.0%	$10,981
Two persons	25,787	31.3	2.00	31.1	10,382
Three persons	14,569	17.7	3.00	20.5	8,063
Four persons	12,768	15.5	4.00	19.8	6,733
Five persons	6,117	7.4	5.00	9.9	5,624
Six persons	2,549	3.1	6.00	4.1	4,647
Seven persons or more	1,643	2.0	7.78	2.6	3,508

Source: U.S. Bureau of the Census, Current Population Reports, Series P-60, No. 132 (July 1982)

Suburban areas surrounding large cities remained the residence of those households with the highest median income, reaching $23,070 in 1980. Households within large central cities had the largest jump in median income between 1979 and 1980, rising 9.8%. The lowest household income was for households in the nonfarm sector, $14,786.

Median Household Income: Metropolitan/Non-Metropolitan Residence, 1979, 1980

	1980	1979	% Change 1980/1979
All households	$17,710	16,461	+ 7.6%
Metropolitan areas with population 1 million or more	20,016	18,325	+ 9.2
In central cities	15,284	13,924	+ 9.8
Outside central cities	23,070	21,325	+ 8.2
Metropolitan areas with population under 1 million	17,884	16,665	+ 7.3
In central cities	15,979	14,810	+ 7.9
Outside central cities	19,879	18,405	+ 8.0
Outside metropolitan areas, total	15,350	14,339	+ 7.1
Farm	17,783	16,491	+ 7.8
Nonfarm	14,786	15,280	- 3.2

Source: U.S. Bureau of the Census, Current Population Reports, Series P-60, No. 132 (July 1982)

INCOME

Household (continued)

As the size of the household increases, the per capita income of the household decreases. However, there are more persons per household at the higher income levels. In 1980, according to the Census Bureau survey, in households with income less than $5,000 there are 1.76 persons. That figure rises with income, peaking at 3.57 in households with incomes of $50,000 and up. Two-person households account for the largest share of aggregate income--31.1% in 1980, up from 30.6% in in 1979.

Distribution of Households & Income by Age of Head, 1980

	(Thousands)		Average Hshold. Size	Distrib. of Total Income	Average Income	
	Households	Persons			Household	Per Capita
Total	82,368	224,723	2.73	$1,734.9	$21,063	$ 7,720
Age of head:	100.0%	100.0%		100.0%		
15-24	7.8	6.4	2.25	5.3	14,227	6,327
25-34	23.3	24.9	2.92	22.9	20,713	7,082
35-44	17.6	23.5	3.65	21.7	26,052	7,131
45-54	15.4	18.7	3.30	20.6	28,169	8,527
55-64	15.4	13.3	2.36	17.2	23,504	9,969
65 & over	20.5	13.1	1.74	12.3	12,628	7,243

Source: U.S. Bureau of the Census, Current Population Reports, Series 60, No. 132 (July 1982)

There is a sizeable amount of unreported income. In a study for Business Week by Louis Harris & Associates (BW, Oct. 11, 1982) it was found that as many as 30% of all American households have some member working in the underground economy. The findings indicated that the underground economy in the U.S. may amount to upwards of $400 billion a year.

CONSUMER PRICES

The consumer price index for the month of December 1982 covering all urban consumers (which reflects the purchases of about 80% of the population) rose 3.9%--the official rate of inflation for the year, according to the Bureau of Labor Statistics. This compares with a rise of 9.9% in the 1981 rate and a 12.4% jump in 1980.

There was actually a decline in consumer prices in December of 0.3%, on a seaonally adjusted basis, compared with November 1982. This matches the drop of 0.3% registered in March 1982 compared with February, and was only the second monthly drop since August 1965 in the consumer price index for all urban consumers.

CONSUMER PRICES

About three-quarters of the improvement in the nation's inflation rate in 1982 came from declining mortgage interest costs and a tapering off in energy price increases. Up sharply, however, were medical costs.

Percent Change in Consumer Price Index for All Urban Consumers
Month of December - Year to Year

	December 1982/1981	December 1981/1980
All items	+ 3.9%	+ 8.9%
Selected items		
Food	+ 3.2	+ 3.6
Housing	+ 3.6	+16.2
Mortgages	-12.5	+18.9
Energy	+ 1.3	+11.9
Apparel	+ 1.6	+ 6.2
Transportation	+ 1.7	+11.5
Medical care	+11.0	+12.8

Source: U.S. Bureau of Labor Statistics

Economists both in and outside of government believe prices may start to rise faster in 1983, and the inflation rate accelerate if federal budget deficits are not brought under control, a condition that appears to be unlikely at this stage.

Producer (or factory) prices of finished goods in 1982 increased 3.5% over 1981. This compares with a 7.1% advance in producer prices in 1981, according to the Bureau of Labor Statistics.

CONSUMER CREDIT

At the end of November 1982, outstanding consumer installment credit expanded at a 9% annual rate in November compared with a 2% rate in the third quarter, according to the Federal Reserve Board. For all of 1981, installment credit increased 6.3%. The increase of $2.52 in consumer installment credit in November (seasonally adjusted) followed a decline of $324 million in October and a rise of $1.09 in September. The November rise was the largest since a $9.98 billion increase reported for September 1981.

The big jump in November reflected a sharp rise in auto sales that month, as the pace of sales quickened when auto makers started offering cut-rate financing on left-over 1982 models. This pace has slackened, however. December 1982 auto sales decreased 4.1% compared with the 12.5% rise in November over the October seasonally adjusted rate. While sales decreased from November to December, auto sales were up 25.8% from the December 1981 rate.

Further declines in consumer finance rates are needed to spur spending on items other than cars, and the outlook in this direction appears to be favorable. As this develops, along with improvement in consumer confidence, consumers are expected to step up the level of buying of durables, drawing to a large extent on credit.

CONSUMER CREDIT

The Fed's report on consumer debt showed that new credit extended in November rose 12.6% to a new high, an adjusted $31.61 billion from $28.06 billion in October 1981. Repayments and other liquidations rose 2.5% in November to an adjusted $29.09 billion, also a new high. At the end of November consumer installment debt totaled $336.99 billion, up 2.4% from a year earlier.

Total Consumer Installment Credit Outstanding At End of Period
By Major Type of Credit
(Millions of Dollars)

	End of Nov. 1982	1981	1980	1979
Outstanding installment credit	$336,991	$333,375	$313,472	$312,024
By Major Holder:				
Commercial banks	148,270	149,300	147,013	154,177
Finance companies	93,462	89,818	76,756	68,318
Credit unions	46,832	45,954	44,041	46,517
Retailers*	27,637	29,551	28,448	28,119
Savings & loans	13,672	11,598	9,911	8,424
Gasoline companies	4,141	4,403	4,468	3,729
Mutual savings banks	2,975	2,751	2,835	2,740
Net change in amount (Seasonally adjusted) outstanding during period	2,523	19,894	1,448	38,381
By Major Holder:				
Commercial banks	904	2,284	-7,163	18,161
Finance companies	1,133	13,062	8,438	14,020
Credit unions	418	1,913	-2,475	2,185
Retailers*	- 98	1,103	329	2,132
Savings & loans	194	1,682	1,485	1,327
Gasoline companies	- 39	- 65	739	509
Mutual savings banks	11	- 85	95	47

*Includes auto dealers and excludes 30-day charge credit held by travel and entertainment companies.

Source: Board of Governors of the Federal Reserve System, (G-19).

Although in the month of November 1982 gains were registered in outstanding credit, the rise was not strong enough to offset the weak consumer spending trend prevailing in 1982. Consumer credit had grown only 2.4% since November 1981 which was well below the inflation rate. In all of 1981, according to the Federal Reserve Board, consumer credit grew by 6.7%.

Consumer credit is watched carefully as a leading indicator of the direction in which future consumer spending is headed. A burst of borrowing can, at times, be followed by "retrenching," or a rise in repayments. When consumers increase payments there is less disposable income within the economy and thus a rise in inventories and a cutback in industrial production is likely to result.

PERSONAL CONSUMPTION EXPENDITURES

For the year 1982, personal consumption expenditures, which represented about 64% of gross national product and about 91% of disposable personal income, totaled $1,972 billion (in current dollars). This was 7.0% over 1981, representing the smallest gain since the 6.9% rise reported for 1970 over 1969, according to the Department of Commerce.

Personal Consumption Expenditures, 1980-1982
(Total & Selected Expenditure Groups)

	Billions of Dollars			% of Total		% Change	
	1982(p)	1981	1980	1982	1981	1982/81	1981/80
Total expenditures	$1,972.0	1,843.2	1,667.2	100.0%	100.0%	+ 7.0%	+10.5%
Durable goods	242.7	234.6	214.3	12.3	12.7	+ 3.4	+ 9.4
Motor vehicles & parts	107.1	98.6	89.7	5.4	5.3	+ 8.6	+ 9.9
Furniture, household equip.	92.8	93.4	86.3	4.7	5.1	- 0.6	+ 8.2
Nondurable goods	762.8	734.5	670.4	38.7	39.8	+ 3.8	+ 9.6
Food	397.8	375.3	343.7	20.2	20.4	+ 6.0	+ 9.1
Clothing & shoes	118.6	114.6	104.7	6.0	6.2	+ 3.5	+ 9.4
Gasoline & oil	93.9	96.8	87.0	4.8	5.2	- 3.0	+11.3
Services	965.8	874.1	782.5	49.0	47.4	+10.5	+11.7
Housing	324.6	295.3	266.0	16.5	16.0	+ 9.9	+11.0

(p) = preliminary
Note: Durable goods is defined as goods having a usefulness of three years or more; nondurable goods, less than three years.

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

On a constant dollar basis, eliminating the effects of inflation, personal consumption expenditures rose only 0.8% in 1982 compared with 1981. The real gain in 1981 was 1.8% over 1980.

Strength in consumer spending is looked upon as the key to economic recovery. Tax cuts plus lower interest rates and a decline in inflation rates are beginning to make themselves felt; however, a depressing factor is the high rate of unemployment. Continued high spending on services is expected to hold down gains in spending for goods.

The Johnson Redbook Service looks for a gain in 1983 of 8.3% in total spending for goods and services in 1983, with the quarterly annual rate rising from a gain of 7.2% in the first quarter to 9.1% in the fourth quarter. Comparable gains expected in spending for goods are 5.1% (for the year), rising from 3.5% to 6.8%.

The Conference Board, in its Economic Forum in December 1982, looked for a rise of 8.2% in personal consumption spending in 1983 on a current dollar basis. The Citibank Economic Forecast Service anticipated that in 1983 real consumer outlays would rise at annual rates of about 4% in the first half, 3% in the second half. The slight deceleration on the second half would reflect a move by the Fed to bring money growth back, according to this source.

PERSONAL CONSUMPTION EXPENDITURES

Durable goods are expected to be the big winners in 1983, rising 8% in real terms, according to the Citibank forecast. It was anticipated that apparel and shoe sales would rise from $84.3 billion (constant dollars) in 1982 to over $87.5 billion in 1983, gaining 3.8%. Gains in housing starts and in housing sales are expected to bring increased demand for many types of household goods.

In analyzing the longer-term outlook on personal consumption expenditures, the Bureau of Labor Statistics expects nondurable items, such as food and household supplies, to continue to grow more slowly than outlays for durable goods and services. This long-term trend reflects the tendency of consumers to spend less of their budget on necessary staples and shift more discretionary income to higher-priced durable goods or services as disposable incomes rise.

Food and tobacco, which together accounted for almost 29% of the personal consumption budget in 1955, are projected to represent only 17% to 19% in 1990. One of the fastest growing categories of spending is expected to be medical care services. This is expected to represent more than 10% of personal consumption expenditures by 1990, up from 8.7% in 1979, due in large part to the aging population.

Other categories of spending projected to rise rapidly include amusements and recreation services, and airline transportation.

A detailed report on consumer spending by major product category is compiled annually by the Bureau of Economic Analysis, U.S. Department of Commerce. This data reflects the value at retail of all goods (new and used) reaching the consumer during the year through regular retail channels, as well as direct sales by manufacturers and wholesalers, and such outlets as prizes, stamp plans, premiums, etc.

Selected categories of spending are covered in the following tables taken from detailed government data.

Personal Consumption Expenditures For Selected Product Categories, 1979-1981

(Millions of Current Dollars)

Selected Categories	1981(r)	1980(r)	1979(r)	% Change 1981/1980
Food & nonalcoholic beverages, total*	$329,063	$299,977	$272,246	+ 9.7%
Food for off-premise consumption**	270,664	248,121	223,360	+ 9.1
Purchased meals & beverages**	97,916	89,414	82,475	+ 9.5
Tobacco products	23,129	20,678	19,258	+11.9
Alcoholic beverages	46,214	43,685	39,326	+ 5.8
Toilet articles & preparations	16,116	14,719	13,600	+ 9.5
Drug preparations & sundries (not including prods. dispensed by doctors, hospitals, etc.)	18,647	17,802	15,754	+ 4.7
Clothing & accessories (not including footwear or jewelry, but including luggage)	95,354	87,286	82,744	+ 9.2
Women's & children's	62,697	56,999	54,088	+10.0
Men's & boys'	32,657	30,287	28,656	+ 7.8
Footwear, total	19,095	17,319	16,291	+10.3
Women's & children's (estimated)	11,150	10,040	9,400	+11.1
Men's & boys (estimated)	7,945	7,279	6,891	+10.7

(continued)

Personal Consumption Expenditures For Selected Product Categories, 1979-1981
(Millions of Current Dollars)
(continued)

	1981(r)	1980(r)	1979(r)	% Change 1981/1980
Jewelry & watches	$ 12,915	$ 11,287	$ 9,537	+14.4%
Home furnishings, household supplies	125,324	115,314	108,364	+ 8.6
Furniture & bedding	19,802	18,615	18,236	+ 6.4
Major appliances, electric housewares	19,253	17,952	16,837	+ 7.2
Dinner & tableware, glassware, utensils	9,673	8,671	7,888	+11.6
Other durable house furnishings#	20,739	19,048	17,978	+ 8.9
Floor coverings	nr	7,162	6,971	--
Semi-durable house furnishings##	10,579	9,553	8,926	+10.7
Home entertainment (TV, radios, records, musical instruments, etc.)	23,906	22,047	20,860	+ 4.8
SUB-TOTAL: Home furnishings, excl. misc. household supplies, etc.	103,952	95,886	90,725	+ 8.4
Misc. household supplies, cleaning preparations, paper products, etc.	21,372	119,428	17,639	+10.0

(r) = revised (nr) = not reported

*Includes expenditures not separately shown, such as the value of food furnished to government and commercial employees, etc.

**Includes alcoholic beverages, and to this extent the figure on consumption of alcoholic beverages shown separately is duplicated.

#Principal furnishings included in "other durable house furnishings" are floor coverings, blankets, comforters, pillows, picture frames, mirrors, art products, lamps, clocks, writing equipment, hand and power tools, garden tools are also included.

##Consists mainly of textile home furnishings except where elsewhere classified, including piece goods for home furnishings. Also includes lamp shades, brooms, and brushes.

Note: Columns may not add to totals shown due to rounding of figures and/or expenditure categories included in totals but not separately reported.

Source: Based on reports from the Office of Business Economics, U.S. Department of Commerce.

PERSONAL CONSUMPTION EXPENDITURES

Personal Consumption Expenditures For Selected Product Categories, 1979-1981
(Billions of Dollars)

Selected Categories	1981(r)	1980(r)	1979(r)	% Change 1981/1980
Food & nonalcoholic beverages, total*	$ 154.2	$ 152.6	$ 149.3	+ 1.0%
Food for off-premises consumption**	131.5	130.5	126.0	+ 0.8
Purchased meals & beverages**	46.8	46.6	47.0	+ 0.4
Tobacco products	14.1	13.6	13.7	+ 3.7
Alcoholic beverages	27.2	27.6	26.8	- 1.4
Toilet articles & preparations	8.3	8.4	8.4	- 1.1
Drug preparations & sundries	10.6	10.7	10.8	- 0.9
Clothing & accessories (not incl. footwear)	70.8	66.6	65.2	+ 6.3
Women's & children's wear	48.5	44.8	43.5	+ 8.3
Men's & boys' wear	22.3	21.8	21.7	+ 2.3
Footwear, total	11.9	11.4	11.5	+ 4.4
Home furnishings	54.9	53.3	53.4	+ 3.0
Furniture & bedding	11.7	11.7	12.5	--
Major appliances, electric housewares	12.2	12.1	11.9	+ 0.8
Dinner & tableware, glassware, utensils & other durable house furnishings#	4.5	4.4	4.5	+ 2.2
Semi-durable house furnishings##	5.8	5.6	5.7	+ 3.6
Home entertainment (TV, radios, records, musical instruments, etc.)	20.7	19.5	18.8	+ 6.2

Note: Columns may not add due to rounding.
See footnotes from preceding table.

(r) = revised

Source: U.S. Department of Commerce,
Office of Business Economics.

RETAIL SALES

Consumer caution and lack of confidence were reflected in the rise of only 3.0% in total retail sales in 1982 compared with 1981. In the previous year sales went up 9.1%. Sales of durable goods stores rose 1.7% in 1982 over 1981, while the nondurable goods store group registered gains of 3.7%.

Retail Sales by Store Type, 1980-1982
(Current Dollars)

	Sales (Billions of $)			% Change	% Change
	1982(p)	1981	1980	1982/81	1981/80
Retail trade, total	$1,070.2	$1,038.8	$951.9	+ 3.0%	+ 9.1%
Durable goods stores, total	332.0	326.6	296.6	+ 1.7	+10.1
Building materials, hardware, garden supply, etc.	50.1	53.2	49.6	- 5.7	+ 7.3
Automotive dealers, auto & home supply stores	189.3	180.7	162.3	+ 4.8	+11.3
Furniture, hfgs., appliance radio, TV stores	44.0	45.7	43.4	- 3.7	+ 5.3
Selected types:					
Furniture stores	nr	18.3	17.5	--	+ 4.6
Appliance, radio, TV stores	nr	14.3	13.2	--	+ 8.3
Jewelry stores	nr	9.5	8.1	--	+17.3
Nondurable goods stores, total	738.2	712.2	655.3	+ 3.7	+ 8.7
General merchandise group	131.5	127.4	117.2	+ 3.2	+ 8.7
Department stores*	108.4	103.7	94.7	+ 4.6	+ 9.5
Misc. general mdse. stores	nr	14.9	13.8	--	+ 8.0
Variety stores	nr	9.0	8.7	--	+ 3.4
Food stores	249.9	237.6	217.0	+ 5.2	+ 9.5
Gasoline service stations	98.1	101.7	93.6	- 3.5	+ 8.7
Apparel, accessory stores	49.2	47.8	44.4	+ 3.0	+ 7.7
Men's, boys' wear stores	nr	7.8	7.8	--	--
Women's ready-to-wear stores	nr	16.4	15.1	--	+ 8.6
Women's accessories/other specialty stores incl. furriers	nr	17.8	16.4	--	+ 8.5
Shoe stores	nr	8.6	7.8	--	+ 9.7
Eating & drinking places	103.6	94.1	85.8	+10.1	+ 9.7
Drug & proprietary stores	34.7	33.0	30.5	+ 5.1	+ 8.2
Liquor stores	nr	17.5	17.1	--	+ 2.3
Non-store retailers**	nr	25.3	23.3	--	+ 8.6
Mail order houses-dept. stores mdse.	nr	261.5	236.4	--	+10.6

(p) = preliminary
nr = not reported
* Data for mail-order catalog desks located within department stores of some mail-order firms are included in the department store estimates.
**Includes mail order, house-to-house & vending machines.

Source: U.S. Bureau of the Census.

RETAIL SALES

On a constant dollar basis, retail sales were down 1.0% in 1982 compared with 1981, according to an analysis by the Johnson Redbook Service.

Retail Sales Trends - Constant Dollars

Percent change:	Total	Durable Gds. Stores	Nondurable Gds. Stores	Retail Total Excl. Auto	Gen. Mdse. Stores	Apparel Stores	Hfgs. Stores
1982/1981	- 1.0%	- 4.1%	- 0.2%	- 1.4%	+ 0.2%	+ 1.2%	- 8.2%
1981/1980	+ 0.9	+ 2.1	+ 1.2	+ 1.0	+ 7.1	+ 8.4	- 0.5

Source: The Johnson Redbook Service.

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Men's Furnishings and Work Wear

FAIRCHILD FACT FILE

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TABLE OF CONTENTS

MEN'S FURNISHINGS

Page

AT THE MANUFACTURER LEVEL:

- MARKET TRENDS.......... 1
- GENERAL STATISTICS ON THE INDUSTRY.......... 2
  - EMPLOYMENT AND EARNINGS.......... 5
  - CONCENTRATION IN THE INDUSTRY.......... 6
  - MANUFACTURERS' OPERATING RATIOS.......... 9
  - LOCATION OF THE INDUSTRY..........10
- PRODUCTION..........12
- SHIPMENTS..........16
- PRODUCER PRICES..........20
- FOREIGN TRADE -- IMPORTS..........21
- FOREIGN TRADE -- EXPORTS..........23

AT THE RETAIL LEVEL:

- THE POTENTIAL MARKET FOR MEN'S FURNISHINGS..........26
- RETAIL SALES..........27
- RETAIL SALES BY STORE TYPE..........29
- CONSUMER PRICES..........34
- RETAIL ADVERTISING..........35
- CONSUMER BUYING HABITS..........35

MEN'S WORK WEAR

- GENERAL STATISTICS ON THE INDUSTRY..........40
  - EMPLOYMENT AND EARNINGS..........42
  - MANUFACTURERS' OPERATING RATIOS..........43
- LOCATION OF THE INDUSTRY..........43
- PRODUCTION..........44
- SHIPMENTS..........47
- PRODUCER PRICES..........50
- RETAIL SALES..........50
- CONSUMER BUYING HABITS..........52

SCHEDULE OF ADDITIONAL FACT FILES..........53

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MEN'S FURNISHINGS

Market Trends

The theory that men's furnishings sales trends run counter to trends in the general economy were substantiated in 1982 in many types of men's furnishings. In spite of depressed sales in apparel as a whole, trade reports indicate that the furnishings business grew at a respectable pace. The prevailing logic behind this rise is that in a poor economy men turn to the less expensive purchase of furnishings and accessories to update their wardrobes rather than spend considerably more for a new suit or jacket. Another favorable trend has been the continued interest in dressing up, helped to a great degree by competition in the job market, particularly affecting younger men who account for the major share of the furnishings business.

Private labels are presently the fastest-growing area in men's furnishings. In a report on a recent survey of retailers (Daily News Record, October 26, 1982) an average 30% of inventories in dress shirts were private label. Many analysts see the oversaturation of the market by designer labels as leading to the upsurge in sales of equal-quality, less-expensive private label lines.

Styling and color remain major considerations in consumer preferences in furnishings. Quality also rates high in consumer considerations. The boom in sales of fashion underwear for men, which began in the late 1970's has continued, and is a prime example of the interest men now take in fashion and color. Growth in fashion underwear is expected to continue as more consumers gain awareness and manufacturers and retailers increasingly promote this merchandise in an exciting way.

The term "furnishings" covers a very diversified group of products, ranging from neckwear to underwear. These products are treated in multi-industry data available from government sources in a manner which does not yield composite information. Nor, perhaps, would that be meaningful because of the varying trends within segments of the product group. However, wherever possible in the following tables men's furnishings data has been extracted from broader-based industry reports.

Information on sports shirts is included in this Fact File only where data is combined with dress shirts. (For sport shirt data, see the Men's Sportswear, Casual Wear Fact File). Hosiery information is covered in the Hosiery/Legwear Fact File. Accessory items, such as jewelry and small leather goods, which are often included in retail data covering men's furnishings departments, are not covered in detail in this report but are covered in the Fashion Accessories Fact File.

Industry data as reported by the Department of Commerce and shown in the following tables include manufacturers of furnishings for both men and boys. Separate figures are available, however, on a product basis for the most part, and these are covered for men's items in this report, with boys' items picked up in the Fact File covering boys' and girls' wear.

AT THE MANUFACTURER LEVEL

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Census Bureau--the most recent covering the year 1977. In intra-census years the Bureau compiles an annual survey of a sample of manufacturers, and reports from these are adjusted for comparability with findings in the complete census.

For a selected group of major industry classifications, including in the furnishings area Men's & Boys' Shirts & Nightwear (SIC 2321), the U.S. Bureau of Industrial Economics has published estimates on manufacturing activity for 1981 and 1982 (1983 U.S. Industrial Outlook), as noted in the following table. According to this source, value of industry shipments in this industry declined at a compound annual rate of -0.1% in constant 1972 dollar terms, in the period 1972-1982.

GENERAL STATISTICS ON THE INDUSTRY

Shirts & Nightwear (SIC 2321*)

	1982(e)	1981(e)	1980	1979	1977
Number of companies	na	na	na	na	667
Number of establishments, total**	na	na	787	779	928
Number with 20 or more employees	na	na	593	597	679
Employees, total (thous.)	111.2	113.6	115.9	120.7	114.7
Production workers (thous.)	99.7	101.2	103.9	108.4	103.0
Payroll (mil. $)	na	na	$ 931.0	$ 885.5	$ 711.3
Value added by manufacture# (mil. $)	$1,928	$1,896	$1,813.5	$1,633.5	$1,445.7
Value of industry shipments## (mil. $)	$3,914	$4,056	$3,479.5	$3,251.0	$2,934.6
Capital expenditures, new (mil. $)	na	na	$ $42.5	$ 36.2	$ 25.9

Underwear (SIC 2322*)

	1980	1979	1978	1977
Number of companies	na	na	na	56
Number of establishments, total**	71	74	66	76
Number with 20 or more employees	58	60	54	59
Employees, total (thous.)	12.7	13.6	15.4	15.1
Production workers (thous.)	11.8	12.2	14.0	13.7
Payroll (mil. $)	$ 101.8	$ 95.6	$ 104.8	$ 92.2
Value added by manufacture# (mil. $)	$ 210.2	$ 213.7	$ 239.4	$ 218.2
Value of industry shipments## (mil. $)	$ 412.5	$ 426.0	$ 468.3	$ 419.8
Capital expenditures, new (mil. $)	$ 12.2	$ 2.7	$ 2.2	$ 2.6

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Knit Underwear Mills (SIC 2254*)

	1980	1979	1978	1977
Number of companies	na	na	na	80
Number of establishments, total**	84	86	96	92
Number with 20 or more employees	72	75	84	74
Employees, total (thous.)	35.9	28.2	27.5	25.2
Production workers (thous.)	23.6	25.3	24.9	23.4
Payroll (mil. $)	$ 245.0	$ 228.3	$ 209.4	$ 175.2
Value added by manufacture # (mil. $)	$ 392.2	$ 405.0	$ 409.8	$ 305.7
Value of industry shipments## (mil. $)	$ 863.5	$ 802.2	$ 747.6	$ 648.9
Capital expenditures, new (mil. $)	$ 21.4	$ 32.7	$ 21.9	$ 14.5

Neckwear (SIC 2323*)

	1980	1979	1978	1977
Number of companies	na	na	na	199
Number of establishments, total**	164	172	181	207
Number with 20 or more employees	86	80	89	81
Employees, total (thous.)	6.8	7.0	6.8	6.3
Production workers (thous.)	5.5	5.4	5.6	5.1
Payroll (mil. $)	$ 75.0	$ 69.6	$ 62.0	$ 57.5
Value added by manufacture# (mil. $)	$ 153.9	$ 141.5	$ 139.7	$ 117.5
Value of industry shipments## (mil. $)	$ 288.4	$ 266.8	$ 270.5	$ 223.8
Capital expenditures, new (mil. $)	$ 2.8	$ 0.9	$ 1.4	$ 2.6

Hats & Caps (SIC 2352*)

	1980	1979	1978	1977
Number of companies	na	na	na	230
Number of establishments, total**	236	240	223	258
Number with 20 or more employees	132	126	118	122
Employees, total (thous.)	17.2	17.3	14.0	12.4
Production workers (thous.)	15.4	15.3	12.6	11.1
Payroll (mil. $)	$ 141.4	$ 131.2	$ 105.2	$ 85.1
Value added by manufacture# (mil. $)	$ 295.4	$ 240.3	$ 175.4	$ 152.7
Value of industry shipments## (mil. $)	$ 534.2	$ 455.4	$ 336.9	$ 284.8
Capital expenditures, new (mil. $)	$ 21.8	$ 6.9	$ 3.8	$ 3.9

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Hosiery (SIC 2252*)

	1980	1979	1978	1977
Number of companies	na	na	na	382
Number of establishments, total **	368	388	354	415
Number with 20 or more employees	250	251	243	257
Employees, total (thous.)	32.3	31.3	32.9	32.2
Production workers (thous.)	28.1	27.5	29.7	29.0
Payroll (mil. $)	$ 290.4	$ 260.8	$ 245.8	$ 218.7
Value added by manufacture# (mil. $)	$ 495.1	$ 436.4	$ 470.1	$ 401.5
Value of industry shipments## (mil. $)	$1,192.9	$1,061.3	$1,031.2	$ 921.3
Capital expenditures, new (mil. $)	$ 22.1	$ 15.5	$ 15.2	$ 14.8

na = not available
(e) = estimated

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2321 comprises establishments primarily engaged in manufacturing men's, youths' and boys' shirts, collars and nightwear from purchased woven or knit fabric (cut-and-sewed). Also includes manufacturers of knit outerwear sports shirts from purchased knit fabric. Does not include work shirt manufacturers. For 1977 the 928 establishments (plants) in this industry included 469 manufacturers, 108 jobbers, 192 independent contractors and 159 multiplant company contractors.

SIC 2322 includes establishments primarily engaged in manufacturing men's, youths' boys' underwear cut and sewed from purchased woven or knit fabric.

SIC 2254 includes establishments primarily engaged in knitting underwear and nightwear from yarn, or in making them from knit fabric produced in the same mill.

SIC 2323 comprises establishments primarily engaged in manufacturing men's, youths' and boys' neckties, scarfs and mufflers cut and sewed from purchased woven or knit fabric.

SIC 2352 includes establishments primarily engaged in manufacturing hats, caps and hat bodies. Millinery is not included.

SIC 2252 includes mills primarily making men's and boys' hosiery. It includes mills engaged in knitting, dyeing or finishing hosiery except women's hosiery. In addition to men's and boys' hosiery, the industry makes anklets for women and children, slipper socks, etc.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

(footnotes continued)

**Each business location is counted as a separate establishment. (For 1979 and 1980 figures are from County Business Patterns (U.S. Bureau of the Census).

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for more purposes the best value of measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made in these industries. The value of the primary product alone (men's furnishings) of these industries, plus the value of these products produced by manufacturers classified in other industries, are shown on pages 17 and 18.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Annual Surveys of Manufactures, 1979, 1980,
U.S. Bureau of Industrial Economics
1983 U.S. Industrial Outlook.

Employment & Earnings

As of October 1982 employment levels in plants producing major categories of furnishings which are reported in monthly Bureau of Labor Statistics' reports were below the level in the same month of 1981. Production worker employment was down somewhat greater, percentage wise, than overall employment. Hourly earnings, however, were generally higher in October 1982.

Men's and boys' hosiery mills generally were faring better both in 1981 and 1982 than the shirt, nightwear and knit underwear mills. The U.S. Bureau of Industrial Economics reported that in the period 1972-1982 production workers employment in the Men's & Boys' Shirt & Nightwear industry declined at a compound annual rate of -0.2%.

Employment & Earnings Among Furnishings Manufacturers
(Includes Producers of Both Men's & Boys')

	Monthly Averages			Annual Averages		
Industry	Oct. 1982(p)	Oct. 1981	% Change, Oct. 1982/1981	1981	1980	% Change 1981/1980
Shirts & nightwear (SIC 2321*)						
All employees (thous.)	90.5	99.4	- 9.0%	97.4	99.2	- 1.8%
Production workers (thous.)	77.1	85.7	- 10.0	83.7	85.8	- 2.4
Avg. weekly earnings	$162.62	$163.99	- 0.8	160.92	$149.14	+ 7.9
Avg. hourly earnings	$ 4.62	$ 4.53	+ 2.0	4.47	$ 4.12	+ 8.5
Avg. weekly hours	35.2	36.2	- 2.8	36.0	36.2	- 0.5
Avg. overtime hours	1.1	0.9	+ 22.2	0.9	1.1	- 18.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment & Earnings Among Furnishings Manufacturers
(Includes Producers of Both Men's & Boys')
(continued)

	Monthly Averages			Annual Averages		
	Oct. 1982(p)	Oct. 1981	% Change, Oct. 1982/1981	1981	1980	% Change 1981/1980
Hosiery, (SIC 2252*)						
All employees (thous.)	31.1	33.2	- 6.3%	32.9	32.9	--
Production workers (thous.)	28.2	30.2	- 6.6	29.9	23.5	+ 27.2%
Avg. weekly earnings	$200.79	$186.24	+ 7.8	$181.98	$166.21	+ 9.5
Avg. hourly earnings	$ 5.27	$ 4.94	+ 6.7	$ 4.84	$ 4.48	+ 8.0
Avg. weekly hours	38.1	37.7	+ 1.1	37.6	37.6	--
Avg. overtime hours	2.3	2.0	+ 15.0	2.0	1.8	+ 11.1
Knit underwear mills (SIC 2254*)						
All employees (thous.)	27.9	29.6	- 5.7%	30.2	30.9	- 2.3%
Production workers (thous.)	23.4	25.6	- 8.6	26.1	26.7	- 2.2
Avg. weekly earnings	$187.76	$181.22	+ 3.6	$177.48	$168.18	+ 5.5
Avg. hourly earnings	$ 5.23	$ 5.02	+ 4.1	$ 4.93	$ 4.57	+ 7.9
Avg. weekly hours	35.9	36.1	- 0.6	36.0	36.8	- 2.2
Avg. overtime hours	1.3	1.2	+ 8.3	1.1	1.5	- 26.7

(p) = preliminary
* For definitions of these SIC codes, see page 4.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings

Concentration in the Industry

Plants in industries producing furnishings are for the most part small operations with fewer than 50 employees. However, although figures for larger operations are generally withheld by the BLS to avoid disclosure of individual companies, plants with over 100 employees, while representing a relatively small share of the total, account for a major percentage of employment and of total shipments.

In neckwear, for example, 6.7% of the plants (11 in number) accounted for about 37% of total employment. In the knit underwear industry, 25 mills (about 30% of the total) accounted for over 80% of total employment in 1980.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Furnishings Manufacturing Establishments by Employment Class Size, 1980

	Establishments		Employees	
Industry	Number	% of Total	No. (Thous.)	% of Total
Shirts & nightwear (SIC 2321*), total	787	100.0%	878.7	100.0%
By establishment size:				
Under 10 employees	108	13.7	(D)	--
10-19 employees	86	10.9	17.2	2.2
20-49 employees	130	16.5	41.9	5.3
50-99 employees	105	13.3	66.8	8.5
100-249 employees	225	28.6	285.9	36.3
250 or more employees	133	16.9	(D)	--
Underwear, cut-&-sewn (SIC 2322*), total	71	100.0%	119.2	100.0%
By establishment size:				
Under 10 employees	9	12.7	(D)	--
10-19 employees	4	5.6	0.6	0.5
20-49 employees	13	18.3	2.7	2.3
50-99 employees	9	12.7	5.7	4.8
100-249 employees	14	19.7	17.1	14.3
250 or more employees	22	31.0	(D)	--
Knit underwear mills (SIC 2254*), total	84	100.0%	24.9	100.0%
By establishment size:				
Under 10 employees	7	8.3	**	--
10-19 employees	5	5.9	0.1	0.4
20-49 employees	10	11.9	0.4	1.6
50-99 employees	17	20.2	1.3	5.2
100-249 employees	20	23.8	3.1	12.4
250 or more employees	25	29.8	20.0	80.3
Neckwear (SIC 2323*), total	164	100.0%	72.3	100.0%
By establishment size:				
Under 10 employees	48	29.3	1.9	2.6
10-19 employees	30	18.3	4.1	5.7
20-49 employees	49	29.9	17.9	24.8
50-99 employees	26	15.9	21.8	30.2
100-249 employees	8	4.9	12.1	16.7
250 or more employees	3	1.8	14.5	20.1
Hats & caps (SIC 2352*), total	236	100.0%	134.3	100.0%
By establishment size:				
Under 10 employees	60	25.4	(D)	--
10-19 employees	44	18.6	5.0	3.7
20-49 employees	53	22.5	16.2	12.0
50-99 employees	38	16.1	22.4	16.6
100-249 employees	32	13.6	45.9	34.1
250 or more employees	9	3.8	(D)	--

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Furnishings Manufacturing Establishments By Employment Class Size, 1980
(continued)

	Establishments		Employees	
	Number	% of Total	No. (Thous.)	% of Total
Hosiery (SIC 2252*), total	368	100.0%	37.8	100.0%
By employment size:				
Under 10 employees	65	17.7	(D)	--
10-19 employees	53	14.4	0.8	2.1
20-49 employees	91	24.8	3.0	7.9
50-99 employees	54	14.7	4.1	10.8
100-249 employees	71	19.3	11.2	29.6
250 or more employees	34	9.2	(D)	--

* For a definition of these SIC codes see page 4.
**Total is less than 0.1.
(D) Withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
County Business Patterns, 1980 (CBP-80-1).

Employment & Share of Industry Shipments in Large Furnishings Manufacturing Plants, 1981

	Number of Plants		% of Industry Shipments Accounted for by Plants With 100 or more Employees
	With 20+ Employees	With 100+ Employees	
Shirts & nightwear (SIC 2321*)	576	407	93%
Underwear, cut-&-sewn (SIC 2322*)	73	59	97
Knit underwear mills (SIC 2254*)	83	56	94
Neckwear (SIC 2323*)	105	19	51
Hats & caps (2352*)	161	51	66
Hosiery (SIC 2252*)	262	104	79

* For a definition of these SIC codes, see page 4.

Source: Sales and Marketing Management,
"Survey of Industrial Purchasing Power",
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Industry concentration in terms of share of shipments by company size has been reported by the Census Bureau for the year 1977. The share of industry shipments accounted for by the 50 largest companies in each of the covered furnishings manufacturing industries ranged from 100% in men's and boys' underwear (cut-&-sewn) to about 65% in shirts and nightwear.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

The four largest companies held a 42% share of 1977 industry shipments in the knit underwear industry and in cut-&-sewn underwear, about 61%.

Concentration Ratios Among Companies Manufacturing Furnishings, 1977

Industry	Value of Shipments (Mil. $)	Percent Accounted For By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Shirts & nightwear (SIC 2321*)	$2,934.6	17.3%	27.5%	47.7%	64.8%
Underwear, cut-&-sewn (SIC 2322*)	419.8	61.4	81.8	95.0	100.0
Knit underwear mills (SIC 2254*)	648.9	42.1	58.5	84.5	98.6
Neckwear (SIC 2323*)	223.8	27.2	39.3	58.4	84.0
Hats & caps (SIC 2352*)	284.8	27.1	42.9	62.6	82.9
Hosiery (SIC 2252*)	921.3	19.1	29.8	46.4	66.4

*For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977
Concentration Ratios in Manufacturing,
MC77-SR-9.

Manufacturers' Operating Ratios

Selected Operating Ratios for Furnishings Manufacturers, 1980
(Median Results)

Industry	No. of Companies Reporting	Current Assets to Current Debt (times)	Net Profits on Net Sales (percent)	Profits on Net Worth (percent)	Sales to Net Worth (times)
Shirts & nightwear (SIC 2321*)	156				
Underwear, cut-&-sewn		1.88	2.40	15.95	6.72
(SIC 2322*)	14	2.05	0.52	4.85	3.75
Knit underwear mills (SIC 2254*)	18	2.57	6.79	26.08	3.44
Neckwear (SIC 2323*)	37	2.51	2.59	15.11	4.83
Hats & Caps (SIC 2352*)	36	1.77	2.05	19.15	5.83
Hosiery (SIC 2252*)	63	2.61	1.90	20.57	5.22

* For a definition of these SIC codes, see page 4.

Source: Dun & Bradstreet
Key Business Ratios, 1980
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GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

New York accounted for the major share of plants in four of the six categories of men's furnishings reported on in the 1977 Census of Manufactures. North Carolina had the greatest number of plants in the hosiery segment, while Pennsylvania ranked first in the number of knit underwear mills.

More than two out of every three plants producing hosiery in the U.S. in 1977 were located in North Carolina while almost half of all neckwear plants were located in New York during that same year.

Leading Manufacturing States in Furnishings, 1977

	No. of Establishments		Value Added by Manufacturer (Mil. $)	Value of Shipments (Mil. $)
Industry	Total	With 20+ Employees		
Shirts & nightwear (SIC 2321*)				
Leading states:				
New York	156	69	$ 161.8	$ 463.2
California	130	76	98.8	241.1
North Carolina	85	71	122.9	251.5
Pennsylvania	76	67	126.2	245.8
Alabama	62	60	166.2	320.6
Tennessee	59	54	143.3	290.1
Georgia	42	40	109.3	212.5
U.S. total	928	679	1,445.7	2,934.6
Leading states, total	610	437	928.5	2,024.8
Percent of U.S. total	66%	64%	64%	69%
Underwear, cut-&-sewn (SIC 2322*)				
Leading states				
New York	12	4	$ 3.9	$ 9.8
Pennsylvania	10	7	6.0	16.6
North Carolina	8	6	(D)	(D)
Kentucky	7	7	(D)	(D)
South Carolina	6	6	14.3	31.9
U.S. total	76	59	218.2	419.8
Leading states, total	43	30	na	na
Percent of U.S. total	57%	51%	na	na
Knit underwear mills (SIC 2254*)				
Leading states				
Pennsylvania	34	29	$ 63.6	$ 147.5
New York	14	9	15.4	29.8
North Carolina	14	10	49.6	100.8
Tennessee	5	5	(D)	(D)
Mississippi	4	4	19.5	34.7
U.S. total	92	74	305.7	648.9
Leading states, total	71	57	na	na
Percent of U.S. total	77%	77%	na	na

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading Manufacturing States in Furnishings, 1977
(continued)

Industry	No. of Establishments		Value Added by Manufacturer (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Neckwear (SIC 2323*)				
Leading states:				
New York	87	35	$ 45.8	$ 87.9
California	20	9	(D)	(D)
New Jersey	13	4	3.5	7.0
Massachusetts	10	4	2.8	5.7
Connecticut	9	6	6.1	10.5
U.S. total	207	81	117.5	223.8
Leading states, total	139	58	na	na
Percent of U.S. total	67%	72%	na	na
Hats & caps (SIC 2352*)				
Leading states:				
New York	86	28	$ 22.2	$ 42.6
Missouri	34	28	(D)	(D)
Pennsylvania	20	11	(D)	(D)
California	17	5	5.7	10.1
Texas	15	7	(D)	(D)
Illinois	12	6	(D)	(D)
New Jersey	12	6	(D)	(D)
Massachusetts	11	4	3.9	9.1
U.S. total	258	122	152.7	248.8
Leading states total	207	95	na	na
Percent of U.S. total	80%	78%	na	na
Hosiery (SIC 2252*)				
Leading states:				
North Carolina	281	168	$ 252.7	$ 589.9
Tennessee	35	29	50.6	111.7
Alabama	28	15	13.7	32.2
Georgia	22	15	22.9	52.1
U.S. total	415	257	401.5	921.3
Leading states, total	366	227	339.9	785.9
Percent of U.S. total	88%	88%	85%	85%

* For a definition of these SIC codes, see page 4.
(D) = Data withheld by the Census Bureau to avoid disclosing figures for individual firms.
na = not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series

PRODUCTION

The overall view of production levels in men's furnishings available from the Federal Reserve Board industrial production indexes was not published by the Board for 1982. However, the trend since 1979 has been downward, with the index for 1981 falling 16.4% from the 1980 level. This compares with an overall decline of 5.2% in overall production of apparel in the same period.

Industrial Production Indexes, 1977-1981
(1967=100)

	1981	1980	1979	1978	1977
Apparel products, total	120.4	127.0	134.4	134.2	124.2
Men's furnishings	119.9	143.4	151.0	135.2	122.5

Source: Board of Governors,
Federal Reserve System, (G.12.3).

Annual data on production of major types of men's wear, based on a survey of all known manufacturers and jobbers (except very small firms) is reported in the Current Industrial Reports issued by the U.S. Bureau of the Census. In 1981 a number of manufacturers not previously included in the annual surveys were added and this has affected comparability of 1981 and 1980 data to varying degrees.

In the following summary, adjustments have been made to show comparable percentage changes based on the share of 1981 production and shipments accounted for by the newly-added manufacturers. In the next table, figures for 1980 production are reported where the affect of the newly-added companies on comparability is minimal.

Summary of Production of Reported Furnishings, 1981/1980
(Men's only, except where noted)

	Thous. Units 1981	% Change 1981/1980
Dress & business shirts, incl. uniforms	98,824	- 5.3%
Pajamas & other nightwear	13,476	- 10.9
Robes (men's & boys')	8,712	- 0.6
Lightweight undershirts with ¼ sleeve, excl. T-shirts made for outerwear	191,688	- 0.7
Sleeveless type athletic undershirts (men's & boys')	38,268	- 11.6
Thermal underwear tops (men's & boys')	19,022	- 15.8
Thermal underwear bottoms (men's & boys')	19,812	- 17.3
Thermal one-piece underwear (men's & boys')	11,752	+ 8.1
Boxer shorts	59,340	na
Other shorts (underwear type)	5,820	- 21.9
Supporter-type knit briefs	242,196	+ 3.6
Hosiery, size ten & up	68,401	+ 8.5

na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23-E(81)-1,
Underwear & Nightwear, MA23G(81)-1.

PRODUCTION

Production of Reported Types of Men's Furnishings, By Type of Fabric & Construction, 1980, 1981

	Thous. units		1981 % of Total
	1981	1980(r)	
Men's dress & business shirts, incl. uniform, total	94,824	*	100.0%
By fabric:			
All cotton & chiefly cotton	14,772		15.6
All man-made & chiefly man-made	67,448		71.1
All other fabric	192		0.2
Fabric, n.s.k.	12,372		13.0
By construction:			
Woven fabric	74,580		78.7
Knit fabric	8,244		8.7
Construction, n.s.k.	12,000		12.7
Uniform shirts	6,804		7.2
Men's pajamas & other nightwear, excl. robes, total	13,476	15,048	100.0
By construction:			
Woven fabric	11,556	12,852	85.8
Knit fabric	1,920	2,196	14.2
By fabric:			
All cotton & chiefly cotton	10,188	11,736	75.6
All man-made & chiefly man-made All other fabric	3,288	3,312	24.4
Men's & boys' robes, total	8,712	8,724	100.0
By construction:			
Woven fabric	3,744	3,312	43.0
Knit fabric	4,968	5,412	57.0
By fabric:			
All cotton & chiefly cotton	2,400	2,508	27.5
All man-made & chiefly man-made All other fabric	6,312	6,216	72.5
Knit underwear			
Men's lightwear undershirts with ¼ sleeve, excl. T-shirts made for outerwear, total	191,688	192,108	100.0
By fabric:			
Cotton/polyester blended fabric	69,756	72,216	36.4
All cotton & all other cotton blends	115,572	119,892	60.3
All other fabric	360	--	0.2
Fabric, n.s.k.	6,000	--	3.1
Men's & boys' sleeveless athletic type undershirts, total	38,268	43,092	100.0
By fabric:			
Cotton/polyester blended fabric	9,396	9,912	24.6
All cotton & all other cotton blends	25,584	29,796	66.9
All other fabric Fabric, n.s.k.	2,784	3,384	7.2

(continued)

Production of Reported Types of Men's Furnishings, By Type of Fabric & Construction, 1980, 1981 (continued)

	Thous. units		1981 % of Total
	1981	1980(r)	
Knit underwear (continued)			
Men's & boys' thermal underwear, incl. winter weight, total	40,586	47,184	--
Tops, total	19,022	22,056	100.0%
By fabric:			
Cotton/polyester blend	11,784	13,344	61.9
All cotton & other cotton blends	5,496	6,432	28.9
All other fabric	660	720	3.5
Fabric, n.s.k.	1,080	1,560	5.7
Bottoms, total	19,812	23,508	100.0
By fabric:			
Cotton/polyester blend	11,544	14,016	58.3
All cotton & other cotton blends	5,208	6,132	26.3
All other fabric	492	768	2.5
Fabric, n.s.k.	2,568	2,592	13.0
One-piece (union-suits), total	1,752	1,620	100.0
By fabric:			
Cotton/polyester blend	768	708	43.8
All cotton & all other cotton blends All other fabric	984	912	56.2
Shorts & briefs, knit			
Men's supporter-type, total	249,756	232,500	100.0
Cotton/polyester blend	88,284	77,436	35.3
All-cotton & all other cotton blends	159,192	151,848	63.7
All other fabric	2,280	3,216	1.0
Boxer shorts, men's, woven	59,304	60,240	100.0
Cotton/polyester blend	50,052	40,056	84.4
All-cotton & all other cotton blends All other fabric	9,252	20,184	15.6

(r) revised from figures originally reported for 1980 but not adjusted for comparability with 1981.

n.s.k. - not specified by kind

*Manufacturers added to the 1981 reports accounted for over 10% of total production of men's shirts in that year, but did not report figures for 1980. Comparable figures are therefore not available.

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA-23E & MA23G(81)-1
(Issued January 1983).

Production of Reported Types of Men's Hosiery by Type Of Fabric & Construction, 1980, 1981

	(Thous. Units) 1981	1980	% Change 1981/1980	1981 % of Total
Men's hosiery, size 10 & up, total (thous. pairs)	68,401	63,063	+ 8.5%	100.0%
Footsocks	517	292	+ 77.0	0.8
Anklets	27,285	27,624	- 1.2	39.9
Mid-calf/crew	19,945	17,375	+ 14.8	29.2
Knee-highs	20,654	17,772	+ 16.2	30.2

Source: National Association of Hosiery Manufacturers, 1981 Hosiery Statistics.

Materials Consumed in Production

Materials Consumed in the Production of Specified Men's Furnishings, 1977

	Delivered Cost (million $)
Shirts & nightwear (SIC 2321*), total	$ 1,107.9
Broad woven fabrics	400.7
Purchased knitted fabrics	365.8
All other materials, containers & supplies	341.4
Underwear (cut-&-sewn) (SIC 2322*), total	182.3
Broad woven fabrics	30.3
Purchased knitted fabrics	112.4
All other materials, containers & supplies	39.6
Knit underwear mills (SIC 2254*), total	325.8
Purchased knitted fabrics	7.5
Carded cotton yarns	94.5
Combed cotton yarns	40.7
Man-made fiber yarns, filament & spun	34.4
All other yarns	25.7
All other materials, containers & supplies	123.0
Neckwear (SIC 2323*), total	93.4
Broad woven fabrics	49.5
Purchased knitted fabrics	1.8
All other materials, containers & supplies	42.1

(continued)

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Production of Specified Men's Furnishings, 1977
(continued)

	Delivered Cost (million $)
Hosiery (SIC 2252*), total	$ 478.1
Hosiery in the griege	134.8
Cotton yarns	53.1
Nylon spun yarns	28.7
Acrylic yarns	71.7
Nylon filament yarns	42.6
Spandex filament yarns	4.8
All other yarns	29.7
All other materials, containers & supplies	112.7

*For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977
Industry Series.

Seasonality in Production

Percent of Men's Dress & Business Shirt Cuttings by Month, 1980, 1981

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1981	100.0%	6.6%	7.8%	9.1%	8.8%	8.8%	6.3%	8.3%	8.1%	9.4%	8.4%	8.9%	9.5%
1980	100.0	10.0	8.8	9.1	8.6	8.3	9.5	6.3	8.4	8.4	9.9	7.1	5.6

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(81)-1

SHIPMENTS

The value of shipments in the following tables covers the total value reported for all manufacturers of the specified product, regardless of the manufacturers' industry classification. This product basis differs from the "industry shipment" data as described in the Industry Section of this report.

The largest single segment of furnishings covered in government data is shirts and nightwear. However, as previously noted, this data includes sport shirts, usually classified in the trade (and in Fact File reports) with sportswear. According to the U.S. Bureau of Industrial Economics, shipments of all types of shirts (except work) and nightwear for men and boys in 1982 gained about 5% in value in 1982 over 1981. In the period 1972-1982, however, on a constant dollar basis, shipments declined in value at a compound annual rate of -0.3%.

SHIPMENTS

Information from the latest report on the Annual Survey of Manufactures covering product shipments for 1980, compared with 1979, are shown below.

Value of Shipments by All U.S. Producers Of Specified Categories of Men's & Boys' Furnishings, 1979, 1980

	Millions of $		% Change
	1980	1979	1980/1979
Men's & boys' shirts (incl. sport shirts) & nightwear	$3,340.1	$3,007.5	+ 11.1%
Men's & boys' knit outerwear sport shirts	1,264.4	1,007.9	+ 25.4
Men's & boys' dress & sport shirts	1,323.8	1,306.5	+ 1.3
Men's & boys' nightwear	167.6	165.5	+ 1.3
Contract work on men's & boys' shirts & nightwear	546.6	527.6	+ 3.6
Shirts & nightwear, n.s.k.	37.7	--	na
Men's & boys' underwear (made from purchased materials)	397.7	386.2	+ 3.0
Men's, youths' & boys' neckwear	280.0	252.5	+ 10.9
Hats & caps, except millinery	543.3	382.1	+ 42.2
Hats & hat bodies, exc. cloth & millinery	205.9	130.0	+ 58.4
Cloth hats & caps	300.4	217.0	+ 38.4
Hats & caps, exc. millinery, n.s.k.	37.0	35.1	+ 5.4
Hosiery	1,189.5	1,045.4	+ 13.7
Men's finished seamless hosiery	681.9	627.6	+ 8.6
All other finished seamless hosiery	355.2	318.3	+ 11.6
Seamless gray hosiery, exc. women's full & knee-high	113.7	70.2	+ 62.0
Hosiery, n.e.c., n.s.k.	38.7	29.4	+ 31.6
Knit underwear & nightwear	731.1	703.7	+ 3.9
Men's & boys' knit underwear & nightwear	538.4	526.7	+ 2.2
Knit underwear & nightwear, n.s.k.	na	12.2	na

n.s.k. = not specified by kind
n.e.c. = not elsewhere classified
na = not available

Source: U.S. Bureau of the Census,
1980 Annual Survey of Manufactures,
Value of Product Shipments M80 (AS)-2.

SHIPMENTS

Information more specifically covering men's furnishings is available through the U.S. Census Bureau's Current Industrial Report series (also covered in the section on Production). This information is based on a survey of manufacturers and jobbers (except small firms).

In 1981 the U.S. Census Bureau added a number of manufacturers in their survey coverage which had not been included in previous data, and this has affected comparability of information on both production and shipments of specific products for 1981 and 1980 to varying degrees. In the furnishings area, this effect is most pronounced in dress and business shirts, but was minimal in other types and comparisons are, therefore, shown for the two years.

Value of Shipments of Specified Types of Furnishings, 1980, 1981
(Men's only, except where noted)

	Millions of $		% Change
	1981	1980	1981/1980
Dress & business shirts, incl. uniform	$ 731.4	$ 672.0	n.c.
Pajamas & other nightwear	78.8	81.4	- 3.2%
Robes (men's & boys')	81.3	74.6	+ 9.0
Boxer shorts, woven	80.2	78.9	+ 1.6
Boxer shorts, knit, supporter type (men's & boys')	6.6	8.7	- 24.1
Supporter-type knit briefs	276.8	245.2	+ 12.9
Lightweights undershirts with ¼ sleeve, excl. outerwear T-shirts	278.9	236.8	+ 17.8
Sleeveless athletic-type undershirts (men's & boys')	40.7	42.9	- 5.1
Thermal underwear (men's & boys')	123.4	124.1	- 0.6
Tops (undershirts)	57.7	56.1	+ 2.8
Bottoms (drawers, etc.)	55.5	58.8	- 5.6
One piece (union suits)	10.2	9.2	+ 10.9

n.c.= not comparable.

Source: U.S. Bureau of the Census, Current Industrial Reports, MA23E and MA23G (81)-1 (issued January 1983).

Shipments by Leading States

No one state dominates as the origin of shipments of reported categories of men's furnishings shipments according to data supplied by the U.S. Bureau of the Census in the 1977 Census of Manufactures. New York is the only state to lead in more than one category by being the primary state for shipments of men's dress & sport shirts as well as nightwear.

SHIPMENTS

Shipments by Leading States

Value of Shipments of Specified Furnishings By All Producers by Leading States, 1977

	Mil. $	% of Total
Dress & sport shirts		
Leading states:		
New York	$ 218.9	16.3%
Tennessee	158.3	11.8
California	140.0	10.4
Georgia	137.7	10.2
Alabama	119.1	8.9
Pennsylvania	81.6	6.1
Leading states, total	855.6	63.6
U.S. total	1,344.6	100.0
Nightwear		
Leading states:		
New York	65.2	42.7
Pennsylvania	18.9	12.4
South Carolina	14.7	9.6
Leading states, total	98.8	64.7
U.S. total	152.8	100.0
Knit & woven underwear		
Leading states:		
Georgia	29.4	8.6
South Carolina	26.8	7.9
New York	18.6	5.4
Alabama	14.4	4.2
Pennsylvania	13.5	4.0
Leading states, total	102.7	30.1
U.S. total	341.4	100.0
Knit underwear & nightwear		
Leading states:		
Pennsylvania	95.8	22.2
North Carolina	72.9	16.9
Mississippi	24.6	5.7
New York	14.8	3.4
Leading states, total	208.1	48.3
U.S. total	431.0	100.0

(continued)

SHIPMENTS

Shipments by Leading States

Value of Shipments of Specified Furnishings By All Producers by Leading States, 1977

(continued)

	Mil. $	% of Total
Men's finished seamless hosiery		
Leading states:		
North Carolina	$ 169.9	36.6
Tennessee	40.6	8.7
Pennsylvania	29.1	6.3
Alabama	18.2	3.9
Georgia	17.4	3.7
Leading states, total	275.2	59.2
U.S. total	464.6	100.0
Hats & hat bodies, exc. cloth & millinery		
Leading states:		
Texas	25.6	38.6
Pennsylvania	13.4	20.2
New York	4.2	6.3
Leading states, total	43.2	65.1
U.S. total	66.4	100.0
Cloth hats & caps		
Leading states:		
Missouri	48.9	27.7
New York	22.8	12.9
Pennsylvania	20.2	11.4
Virginia	11.3	6.4
Texas	9.1	5.1
Leading states, total	112.3	63.6
U.S. total	176.6	100.0

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

PRODUCER PRICES

The largest jump in prices, as measured by the U.S. Bureau of Labor Statistics Producer (Factory) Price Indexes, in furnishings between 1981 and 1982 was for knit undershirts, up 11.3% in the one year period. Prices for men's & boys' knit shorts and briefs rose 11.2% between 1981 and 1982, while the smallest increase of any category was in hats and caps where factory prices went up a meager 0.5%.

PRODUCER PRICES

Producer Price Indexes for Specified Furnishings, 1980-1982
(1977 = 100, unless otherwise indicated)

	Annual Averages			% Change	
	1982(p)	1981	1980	1982/1981	1982/1980
All items*	299.3	293.4	268.8	+ 2.0%	+ 11.3%
Men's & boys' wear, all types*	219.5	210.9	200.4	+ 4.1	+ 9.5
Men's dress & business shirts	133.1	126.8	120.3	+ 5.0	+ 10.6
Men's socks	141.4	135.3	122.3	+ 4.5	+ 15.6
Men's & boys' knit undershirts*	256.8	230.8	204.3	+ 11.3	+ 25.7
Men's & boys' knit shorts & briefs	137.5	123.7	114.3	+ 11.2	+ 20.3
Men's & boys' nightwear*	228.2	226.3	214.9	+ 0.8	+ 6.2
Men's & boys' ties	125.3	120.5	118.4	+ 4.0	+ 5.8
Hats & caps	132.8	132.2	118.2	+ 0.5	+ 12.4

* = 1967 = 100
(p) - preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports play a significant role in many types of furnishings and have accounted for much of the growth in the U.S. market. According to the U.S. Bureau of Industrial Economics, imports accounted for about 38% of total apparent consumption in the U.S. of men's and boys' shirts and underwear. Imports represented almost 25% of new supply (product shipments plus imports) while exports represented only 2.2% of U.S. shipments in 1982.

Detailed figures on imports and exports from the Census Bureau are covered in the following tables. In the first nine months of 1982 compared with the same period of 1981 imports of reported categories were well ahead. Imports of nightwear/underwear (not knit), up 43% in value; shirts (not knit), up over 27%; knit underwear, up 18%; knit shirts, up 10%.

Imports

Quantity & Value of Imports of Specified Furnishings By Leading Countries of Origin, 1980, 1981

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. Dollars)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Furnishings, reported categories, total	5,072.5	4,433.3	+ 14.4%	$185.4	$149.4	+ 24.1%
Dress shirts, cotton, not knit, total	929.7	742.1	+ 25.3	60.2	46.7	+ 28.9
Hong Kong	535.0	470.5	+ 13.7	35.6	29.5	+ 20.7
Singapore	115.3	56.8	+103.0	6.3	2.9	+117.2
India	103.9	51.7	+101.0	5.0	2.6	+ 92.3

(continued)

FOREIGN TRADE

Imports

Quantity & Value of Imports of Specified Furnishings By Leading Countries of Origin, 1980, 1981 (continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. Dollars)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
T-shirts, cotton, not knit total	775.5	636.8	+ 21.8%	$ 13.7	$ 10.8	+ 26.9%
Pakistan	327.1	224.0	+ 46.0	2.5	1.6	+ 56.3
Mainland China	135.8	87.8	+ 54.7	1.9	1.1	+ 72.7
Mexico	81.5	67.0	+ 21.6	3.3	2.9	+ 13.8
Dressing gowns & robes, not knit, cotton, total	46.0	53.7	- 14.3	3.9	4.8	- 18.8
Taiwan	13.4	8.0	+ 67.5	0.5	0.3	+ 66.7
Brazil	8.7	9.3	- 6.5	1.7	1.8	- 5.6
Hong Kong	8.5	8.5	--	0.5	0.4	+ 25.0
Dressing gowns & robes, not knit, wool, total	0.6	0.7	- 14.3	0.2	0.1	+100.0
Korea	0.5	na	na	0.1	na	na
Dressing gowns & robes, not knit, man-made, total	14.0	33.4	- 58.1	0.6	0.6	--
Mainland China	6.0	3.3	+ 81.8	0.3	0.2	+ 50.0
Taiwan	3.8	2.0	+ 90.0	0.2	0.1	+100.0
Underwear, not knit, total	na	na	--	4.2	2.6	+ 61.5
Honduras	na	na	--	3.8	1.7	+123.5
Nicaragua	na	na	--	1.3	0.6	+116.7
Underwear, knit, total	395.6	870.6	+ 2.9	8.0	7.7	+ 3.9
Hong Kong	475.4	359.2	+ 32.3	2.5	1.8	+ 38.9
Taiwan	142.4	76.2	+ 86.6	1.2	0.6	+100.0
Mexico	132.0	310.1	- 57.4	1.2	2.6	- 53.8
Pajamas, not knit, cotton total	848.5	846.7	+ 0.2	36.2	34.0	+ 6.5
Dominican Republic	242.9	257.3	- 5.6	9.3	9.7	- 4.1
Hong Kong	239.2	249.2	- 4.0	10.4	10.1	+ 3.0
Taiwan	133.7	93.9	+ 42.4	5.7	3.7	+ 54.1
Pajamas, not knit, man-made total	90.2	115.7	- 22.0	3.7	4.5	- 17.8
Dominican Republic	46.8	65.9	- 29.0	1.7	2.3	- 26.1
Korea	21.1	36.9	- 42.8	1.0	1.7	- 41.2
Taiwan	19.8	10.4	+ 90.4	0.9	0.4	+125.0

(continued)

FOREIGN TRADE

Imports

Quantity & Value of Imports of Specified Furnishings By Leading Countries of Origin, 1980, 1981
(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. Dollars)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Neckties, not knit, total	390.1	281.9	+ 38.4%	$ 19.0	$ 15.2	+ 25.0%
Italy	209.1	162.0	+ 29.1	11.3	9.0	+ 25.6
Dominican Republic	53.8	10.8	+398.1	0.8	0.2	+300.0
United Kingdom	45.9	39.5	+ 16.2	1.7	1.8	- 5.6
Headwear, fur not on the skin, total	69.7	29.8	+133.9	12.6	5.4	+133.3
Brazil	13.8	2.1	+557.1	2.8	0.3	+833.3
Federal Republic of Germany	13.7	4.5	+204.4	2.0	0.8	+150.0
Portugal	8.4	1.2	+600.0	0.9	0.1	+800.0
Work shirts, not knit, cotton, total	237.1	185.1	+ 28.0	9.4	6.2	+ 51.6
Hong Kong	104.5	65.3	+ 60.0	4.1	2.3	+ 78.3
Taiwan	40.6	39.4	+ 3.0	1.5	1.3	+ 15.4
Mainland China	20.8	8.5	+144.8	0.8	1.0	- 20.0
T-shirts, knit, cotton total	775.5	636.8	+ 21.8	13.7	10.8	+ 26.9
Pakistan	327.1	224.0	+ 46.0	2.5	1.6	+ 56.3
Mainland China	135.8	87.8	+ 54.7	1.9	1.1	+ 72.7
Mexico	81.5	67.0	+ 21.6	3.3	2.9	+ 13.8

* = The CIF value represents the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT135,
Dec. 1980, 1981.

Exports

U.S. exports of men's & boys' furnishings were down 8.0% in dollar value despite a slight gain on a unit basis. Exports totaled $92.2 million in 1981 compared with $100.3 in the previous year. On a unit basis, exports of furnishings were 6.9 million dozen, in 1981 and 6.8 million in 1980.

FOREIGN TRADE

Exports

Underwear, the largest furnishing export, registered a 0.5% gain in value in 1981, reaching $18.9 million, compared with $18.8 million in 1979. On a unit measure, exports of underwear fell during the period to 1.5 million dozen a 10.9% decline from 1979's value of 1.7 million dozen.

Quantity & Value of Exports of Specified Furnishings, 1980, 1981

	Quantity (Dozens)		% Change	F.A.S. Value* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Furnishings, reported categories total	6,889,394	6,843,927	+ 0.6%	$92,231	$100,288	- 8.0%
Dress shirts, not knit	222,532	321,187	- 30.7	7,961	9,494	- 16.1
Cotton	96,994	172,795	- 43.9	3,787	4,645	- 18.5
Man-made	125,538	148,392	- 15.4	4,174	4,849	- 13.9
Work shirts, not knit	91,632	112,702	- 18.7	2,671	2,605	+ 2.5
Cotton	30,030	63,845	- 53.0	1,380	1,556	- 11.3
Man-made	61,602	48,857	+ 26.1	1,291	1,049	+ 23.1
Dress & work shirts, knit	341,655	319,571	+ 6.9	9,378	8,963	+ 4.6
Cotton	224,353	206,912	+ 8.4	7,026	6,739	+ 4.3
Man-made	117,302	112,659	+ 4.1	2,352	2,224	+ 5.8
Robes & dressing gowns, not knit	1,115,954	1,102,048	+ 1.3	4,085	5,068	- 19.4
Cotton	1,099,698	1,094,549	+ 0.5	3,583	4,747	- 24.5
Wool	437	2,081	- 79.0	45	104	- 56.7
Man-made	15,819	5,418	+192.0	457	217	+110.6
Pajamas & other nightwear, total	358,527	438,965	- 18.3	10,523	12,859	- 18.2
Not knit	20,622	104,163	- 80.2	736	3,072	- 76.0
Cotton	8,557	82,076	- 89.6	290	2,357	- 87.7
Wool	1,593	748	+113.0	57	36	+ 58.3
Man-made	6,715	19,114	- 64.9	273	563	- 51.5
Other textile material	3,757	2,225	+ 68.9	116	116	--
Knit	337,905	334,802	+ 0.9	9,787	9,787	--
Cotton	328,072	317,364	+ 3.4	9,292	9,092	+ 2.2
Man-made	3,814	5,471	- 30.3	240	351	- 31.6
Wool	1,382	9,844	- 86.0	82	281	- 70.8
Other textile material	4,637	2,123	+118.4	173	63	+174.6
Underwear, total	1,522,899	1,708,263	- 10.9	18,939	18,845	+ 0.5
Underwear, briefs, drawers, undershorts	909,398	1,151,235	- 21.0	11,401	12,002	- 5.0
Not knit	488,154	598,634	- 18.5	4,913	4,396	+ 11.8
Cotton	444,952	273,711	+ 62.6	4,574	3,193	+ 43.3
Man-made	43,202	324,923	- 86.7	339	1,203	- 71.8

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Furnishings, 1980, 1981
(continued)

	Quantity (Dozens)		% Change	F.A.S. Value* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Underwear, total (continued)						
Knit	421,244	552,601	- 23.8%	$ 6,488	$ 7,606	- 14.7%
Cotton	278,736	477,811	- 41.7	4,644	6,816	- 31.9
Man-made	142,508	74,490	+ 91.3	1,844	790	+133.4
Underwear, other than briefs, drawers & undershorts	525,124	503,954	+ 4.2	5,647	6,008	- 6.0
Not knit	292,760	165,817	+ 76.6	2,346	1,051	+123.2
Cotton	85,304	26,108	+226.7	1,058	390	+171.3
Man-made	207,456	139,709	+ 48.5	1,288	661	+ 94.9
Knit	232,364	338,137	- 31.3	3,301	4,957	- 33.4
Cotton	151,960	278,386	- 45.4	2,315	4,272	- 45.8
Man-made	80,404	59,751	+ 34.6	986	685	+ 43.9
Underwear, nspf, of textile material not specified	118,377	53,074	+123.0	1,891	835	+126.5
Not knit	21,090	13,435	+ 57.0	334	242	+ 38.0
Knit	97,287	39,639	+145.4	1,557	593	+162.6
T-shirts, all white, knit	1,926,285	1,573,965	+ 22.4	26,890	31,063	- 13.4
Cotton	1,609,060	1,267,818	+ 26.9	20,767	21,381	- 2.9
Man-made	317,225	306,147	+ 3.6	6,123	9,682	- 36.8
Neckties, textile materials	120,932	89,691	+ 34.8	2,095	1,519	+ 37.9
Not knit	103,667	68,162	+ 52.1	1,752	1,186	+ 47.7
Knit	17,265	21,529	- 19.8	343	333	+ 3.0
Hosiery, cotton (dozen pairs)	1,188,978	1,177,535	+ 1.0	9,689	9,872	- 1.9

nspf = not specially provided for.

*F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance, and any other charges of transportation costs beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1981 and 1980.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET FOR MEN'S FURNISHINGS

According to Census Bureau estimates of the U.S. population in 1982, by age group, males aged 20-34 accounted for the largest percentage (27.3%) of any age group in the male population. Projections made by the Census Bureau indicate that by the year 1990, men in the 35-49 year old age bracket will increase by over 30% and constitute 21.1% of the male population compared with 25.8% share for the 20-34 year olds. By the year 2000, however, the 20-34 year old group will slide to 20.8% of total male population, to be surpassed by the 35-49 year old group which is expected to represent 24.2% of all males in that year.

Male Population of the U.S., 1982 & Projections to 2000
(Millions of Males)

					% Change 2000/1982	% of Male Population			
	1982	1985	1990	2000		1982	1985	1990	2000
Total, all ages	112.9	116.1	121.5	130.4	+ 15.5%	100.0%	100.0%	100.0%	100.0%
Under 16 years	28.1	28.4	29.6	30.6	+ 8.9	24.9	24.5	24.4	23.5
16 years & over	84.8	87.7	91.9	99.8	+ 17.7	75.1	75.5	75.6	76.5
16-19 years	8.3	7.5	7.0	7.7	- 7.2	7.4	6.5	5.8	6.9
20-34 years	30.8	31.7	31.3	27.1	- 12.0	27.3	27.3	25.8	20.8
35-49 years	19.2	21.5	25.6	31.6	+ 64.6	17.0	18.5	21.1	24.2
50-64 years	15.8	15.6	15.4	19.7	+ 24.7	14.0	13.4	12.7	9.7
65 years & over	10.8	11.5	12.7	13.7	+ 26.9	9.6	9.9	10.5	10.5
Median age in years	29.3	30.2	31.8	34.9					

Source: U.S. Bureau of the Census,
Population Estimates and Projections,
Series P-25, No. 922 (October 1982).

The following table covers estimates on the current adult male population (18-74 years of age) in specific height/weight groups, based on an analysis of information from the U.S. Department of Health, Education & Welfare (now renamed the Department of Health and Human Services) and from the U.S. Census Bureau.

Close to 2.5 million men, 3.3% of all adult male population stand six feet two inches or taller. At the other end of the spectrum, over ten million men, 13.6% of males are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch to six feet one inch height range.

THE POTENTIAL MARKET FOR MEN'S FURNISHINGS

Distribution of the U.S. Male Population by Height/Weight Groups, 1982
(Numbers in Thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
Total, 18-74 years	75,274	10,237	27,023	35,529	2,485
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	16,937	5,119	6,925	4,742	151
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	31,464	3,764	13,323	14,001	376
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	14,829	903	4,516	8,732	678
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,033	376	1,882	6,022	753
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,011	75	377	2,032	527
Percent	4.0%	0.1%	0.5%	2.7%	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979 & U.S. Bureau of Census population projections.

RETAIL SALES

Current Trends

According to a national sales projection compiled by NPD Research Inc., which tracks purchases of 6,500 families, sales of all men's and boys' wear in the 12-month period ending September 1982 were slightly below (-0.2%) projected sales figures for the same period a year earlier.

The men's and boys' hosiery classification registered strongest in product classifications reported on by NPD (+2.6%). Other winners were in the furnishings classification: pajamas, robes (+1.1%); accessories (included with furnishings in some retail operations) were also up over one percent.

Men's & Boys' Wear Sales In Reported Classifications

	Percent Change 10/81-9/82 vs. 10/80-9/81
Men's & boys' wear, total	- 0.2%
Underwear	-0-
Socks, hosiery	+ 2.6
Pajamas, robes	+ 1.1
Accessories	+ 1.1

(continued)

RETAIL SALES

Current Trends

Men's & Boys' Wear Sales In Reported Classifications (continued)

	Percent Change 10/81-9/82 vs. 10/80-9/81
Shirts, sweaters, other tops	- 1.4%
Suits, sport coats, vests	- 0.8
Coats, outer jackets	- 7.5
Pants, jeans, slacks, shorts	+ 2.0

Source: NPD Textile and Apparel Service,
NPD Research Inc.

Dress Shirts

Sales of men's dress shirts in 1982 were bouyed by consumer resistance to higher-ticket apparel while still wanting to update wardrobes. Shirts, as well as other furnishing items, have been seen as an inexpensive method of refurbishing an aging wardrobe. Industry analysts indicate that in 1981 unit sales of dress shirts increased by approximately 5% over 1980 with consumers tending to pay higher prices for their shirts.

Neckwear

1982 was a record year for neckwear sales with many retailers reporting double digit increases in their volume from the previous year. Designer labels, popular among younger men, are reported to be responsible for much of the increase.

Underwear

Consumer acceptance of fashion underwear, with its emphasis on styling and color has helped boost overall men's underwear sales from 5%-10% from the $1.3 billion reported in 1981. Fashion underwear's share is currently estimated at from 15%-20% of the underwear market. With consumers showing little resistance to price points, that range to as much as 50% higher than classic underwear prices, retailers expect the boom to continue.

Other items such as jewelry, small leather goods, etc., are generally considered to be in the accessories field and information about them may be found in the Fact File covering Fashion Accessories (Men's and Women's). Additional information on the hosiery industry is included as a part of the Hosiery/Legwear (Men's, Women's and Children's) Fact File. Men's sport shirts are covered extensively in the Men's Sportswear, Casual Wear and Jeans Fact File.

RETAIL SALES BY STORE TYPE

The latest official information on men's furnishings sales is contained in the 1977 Census of Retail Trade compiled by the U.S. Census Bureau. Data, however, is incomplete as only stores with payrolls were included in the merchandise line reports and not all store types (for example, supermarkets) which sell men's furnishings items were required to supply detailed information on sales by type of merchandise.

Shirts

Census data covered both dress and sport shirts for men. Department stores accounted for about 18% of the reporting stores and almost 51% of reported sales of shirts in 1977.

Reported Sales of Men's Dress & Sport Shirts (Woven)
By Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's dress & sport shirts	42,404	100.0%	$2,625.1	100.0%
Department stores**	7,702	18.2	1,336.3	50.9
Men's wear stores	16,894	39.8	798.4	30.4
Family clothing stores	12,578	29.7	412.2	15.7
Other (women's ready-to-wear stores, men's shoe stores, mail order houses)	5,230	12.3	78.3	3.0

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Hosiery, Pajamas & Underwear

Department stores, accounting for 19.0% of all stores reporting sales of men's hosiery, pajamas & underwear in 1977, garnered over 65% of the categories volume in that year. Overall retail sales of the group reached $1.4 billion in 1977 although outlet types such as supermarkets, drug stores, variety stores, etc. were not included in the census data on furnishings sale.

Reported Sales of Men's Hosiery, Pajamas & Underwear
By Store Type, 1977
(Includes only stores with payroll)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's hosiery, pajamas & underwear	36,570	100.0%	$1,370.0	100.0%
Department stores**	6,943	19.0	902.8	65.9
Men's wear stores	12,300	33.6	203.5	14.9
Family clothing stores	9,372	25.6	190.5	13.9
Family shoe stores	3,105	8.5	28.0	2.0
Men's shoe stores	517	1.4	3.7	0.3
Mail order houses	3,572	9.8	31.8	2.3
Women's ready-to-wear stores	761	2.1	9.7	0.7

(See footnotes for table on men's dress & sport shirts.)

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Sales Contribution To Total Men's & Boys' Wear Business

Percent of Total Men's & Boys' Wear Sales Accounted For By Specified Men's Furnishings In Key Store Types Reporting Sales, 1977

	Total Men's & Boys' Wear Sales Mil. $	% of Total Men's/Boys' Wear Sales - Specified Men's Items		
		Dress & Sport Shirts	Novelty/ Knit Shirts	Hosiery, Pajamas Underwear
Department stores	$10,574.9	12.6%	3.5%	8.5%
Men's wear stores	6,275.4	12.7	3.6	3.2
Family clothing stores	3,001.5	13.7	3.4	6.3

Source: Based on U.S. Bureau of the Census, Census of Retail Trade, 1977.

Men's Wear Stores

Men's & Boys' Clothing & Furnishings Stores by Employee Size, 1980

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Men's & boys' clothing & furnishings stores, total	18,106	100.0%	140,240	100.0%	$1,271.9	100.0%
By establishment size:						
Under 10 employees	13,994	77.3	62,732	44.7	542.9	42.7
10 to 19 employees	3,804	21.0	41,509	29.6	361.3	28.4
20 to 49 employees	910	5.0	25,841	18.4	252.0	19.8
50 to 99 employees	99	0.5	6,546	4.7	71.1	5.6
100 or more employees	19	0.1	3,612	2.6	44.6	3.5

Source: U.S. Bureau of the Census, County Business Patterns, 1980

Number of Stores & Sales of Men's & Boys' Wear Stores

	January-October			Annual Averages				
			% Change				% Change	
	1982	1981	1982/1981	1981	1980	1979	1981/1980	1981/1979
Total sales (mil. $)	$5,639	$5,682	- 0.8%	$7,768	$7,830	$7,830	- 0.8%	- 0.8%
No. of stores	na	na	na	na	18,106	18,517	na	na

na = not available

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-81S,
Monthly Retail Sales BR-82-10,
County Business Patterns, 1980, 1979.

RETAIL SALES BY STORE TYPE

Men's Wear Stores

The only category to register a decline in sales in the typical men's specialty store in 1981 was sleepwear (-0.2%) according to information supplied by the Menswear Retailer of America. The largest gain was recorded by neckwear, whose 1981 sales rose a median 12.9% over the 1980 level.

Selected 1981 Merchandising & Operating Results in Men's Wear Stores
(Median Results)

	Men's					
	Dress Shirts	Neckwear	Hosiery	Underwear	Sleepwear	Headwear
% change in sales from last year (60)*	+ 4.0%	+12.9%	+11.4%	+ 8.1%	- 0.2%	+ 3.3%
% of total store sales (71)*	6.7	3.2	1.1	1.5	0.9	0.7
% of men's furnishings sales (71)*	35.5	18.9	6.6	8.6	4.9	4.3
% distribution of average inventory in men's furnishings dept. (37)*	36.0	14.2	5.1	8.9	5.2	4.7
Markdowns, % of men's furnishings sales (45)*	9.4	8.3	2.7	3.4	6.7	14.2
Number of stock turns (37)*	1.8	2.5	2.3	1.7	1.6	1.3

*Number in parenthesis refers to the number of reporting firms in each category.

Source: Menswear Retailers of America,
1981 Annual Business Survey.

Department Stores

Department Stores by Employee Size, 1980

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Department stores, total	9,240	100.0%	1,590,940	100.0%	$12,166.5	100.0%
By establishment size:						
Under 50 employees	1,159	12.5	45,372	2.9	323.5	2.7
50-99 employees	2,326	25.2	172,894	10.9	1,182.8	9.7
100-249 employees	4,132	44.7	639,536	40.2	4,479.6	36.8
250-999 employees	1,564	16.9	619,226	38.9	4,969.2	40.8
1,000 or more employees	59	0.7	113,912	7.1	1,211.4	10.0

Source: U.S. Bureau of the Census,
County Business Patterns, 1980

According to the National Retail Merchants Association, men's furnishings sales in department stores with total sales over $1 million rose from a median 13.7% in 1981 from the year before. Typical sales per square foot of selling space were much higher for men's furnishings than for the entire upstairs store in general.

RETAIL SALES BY STORE TYPE

Department Stores

Sales of men's ties increased a median of 20.8% in 1981, while dress shirts sales rose 16.8%.

Selected 1981 Merchandising & Operating Results of Men's Furnishings In Department Stores With Sales Over $1 Million
(Median Results)

	Total Upstairs Store (143)*	Adult Male Apparel (111)*	Men's Furnishings** (100)*	Men's Dress Shirts (39)*	Men's Ties (31)*
Net sales, % change from last year	+ 6.7	+ 11.0	+ 13.7	+ 16.8	+ 20.8
Sales, % of merchandise division	nr	100.0	45.8	10.4	4.1
Sales, % of total store	90.1	12.4	5.7	1.3	0.5
$ sales per square foot of selling space (main or largest selling unit)	$111.8	$176.9	$185.1	$145.0	nr
Cumulative markon, %	48.0	50.3	50.6	49.3	55.1
Gross margin, % of sales (incl. cash discounts)	42.0	43.5	45.9	45.1	55.0
Markdowns, % of retail sales	13.0	12.5	10.3	9.8	6.1
Number of stock turns	2.7	2.8	3.1	2.9	3.5
Selling salaries, % of sales (main or largest selling unit)	7.5	6.8	6.4	6.1	6.1
Sales promotion costs, % of sales	3.2	2.9	2.9	4.3	2.4

nr = not reported
*Number in parenthesis refers to the number of reporting stores in each category.
**Men's furnishings include sport shirts, sweaters, vests, dress shirts, hosiery, pajamas, robes and underwear.

Source: National Retail Merchants Association, 1981 Merchandising & Operating Results, (1982 Edition)

Seasonal Patterns in Sales of Men's Furnishings & Hat Departments
(Five Year Average)*

Month	Percent of Total Sales
January	4.7%
February	4.7
March	5.1
April	5.6
May	6.5
June	9.7
July	5.8
August	5.3

(continued)

RETAIL SALES BY STORE TYPE

Department Stores

Seasonal Patterns in Sales of Men's Furnishings & Hat Departments
(Five Year Average*)
(continued)

Month	Percent of Total Sales
September	5.9%
October	7.3
November	11.5
December	27.9
Five year average	100.0%

*Based on Federal Reserve Board Figures (1961-1965) (Latest available).

Source: Newspaper Bureau of Advertising.

CONSUMER PRICES

The consumer price index for men's furnishings and special clothing (uniforms, etc.) rose 6.7% in 1982 well above the 3.8% registered by all men's apparel during that same period. Men's shirt prices (retail) rose 3.1% between 1981 and 1982.

Consumer Price Index for Specified Men's Furnishings 1980-1982
(Index for all Urban Consumers)
(December 1977=100)

	1982(p)	1981	1980	% Change 1982/1981	% Change 1982/1980
All men's wear	116.0	111.7	106.0	+ 3.8%	+ 9.4%
Men's furnishings & special clothing	138.4	129.7	118.4	+ 6.7	+ 16.9
Men's shirts (dress & sport)	122.4	118.7	113.7	+ 3.1	+ 7.7

(p) = preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

RETAIL ADVERTISING PATTERNS BY MONTH

Dress Shirt Retail Advertising
Percent of Year's Total Newspaper Linage Used Each Month, 1981

Month	Dress Shirts
January	4.3%
February	4.8
March	5.9
April	7.3
May	7.9
June	16.3
July	4.2
August	4.2
September	9.3
October	7.7
November	11.4
December	16.7
Total	100.0%

Source: The Advertising Checking Bureau, Inc.-
Neustadt Reports Div. (based on retail
newspaper advertising linage in 7 markets:
Chicago, Philadelphia, Cincinnati, Dallas,
Cleveland, Los Angeles and Washington, D.C.)

CONSUMER BUYING HABITS

Dress Shirts

The following tables on specified men's furnishings items have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an ongoing monthly panel diary, tracking the purchases of 6,500 nationally representative families.

Dress Shirt Purchases by Price Point
(Percent of Units Purchased)

	10/81 - 9/82	10/80 - 9/81
Total Units	100.0%	100.0%
Under $5.00	16.1	20.4
$5.00 - $9.99	37.1	38.0
$10.00 - $14.99	25.7	26.2
$15.00 - $20.00	13.9	10.8
Over $20.00	9.2	4.6

(continued)

CONSUMER BUYING HABITS

Dress Shirts

Dress Shirt Purchases by Type of Fabric
(Percent of Units Purchased)

	10/81 - 9/82	10/80 - 9/81
Total Units	100.0%	100.0%
All nylon	1.8	2.9
Cotton/polyester	13.6	9.2
All cotton	6.0	8.7
All polyester	10.7	12.3
Polyester/cotton	67.9	66.9

Dress Shirt Purchases by Type of Outlet
(Percent of Units Purchased)

	10/81 - 9/82	10/80 - 9/81
Total Units	100.0%	100.0%
Department stores	33.0	32.2
Discounters	20.9	19.4
Specialty stores	15.4	15.9
Chains	25.8	26.4
Other	4.8	6.1

In an R.H. Bruskin survey 1,000 men and women, selected to mirror the national population, were asked to indicate their store preferences when buying men's dress shirts. The results were published in Daily News Record (August 19, 1982) and indicated that 45% of all respondents ranked department stores as the type in which they were most likely to purchase dress shirts. Specialty stores ranked next, followed (in descending order) by chain stores and discounters.

CONSUMER BUYING HABITS

Dress Shirts

Expectation of Next Place of Purchase of Men's Dress Shirts

	Department Stores	Specialty Stores	Chain Stores*	Discount Stores	All Others	No Answer
Total, all respondents	45%	28%	15%	3%	4%	5%
Sex:						
Male	37	33	17	3	5	5
Female	53	24	14	1	3	5
Age:						
18-24 years	41	30	17	1	9	2
25-34 years	50	37	12	3	4	4
35-49 years	54	26	10	3	3	4
50-64 years	46	30	17	1	2	5
65 & over	31	32	20	3	3	11
Income:						
Under $15,000	36	29	19	2	4	11
$15,000-$19,999	44	31	12	4	4	5
$20,000-$29,999	50	24	18	3	3	2
$30,000-$39,999	56	27	10	2	4	1
$40,000 & over	49	35	8	1	6	1
Region:						
Northeast	48	27	13	1	4	7
North Central	40	33	17	4	3	3
South	46	27	15	1	6	6
West	49	27	15	1	4	4

*The national chains figures includes retailers such as Sears, Penneys & K mart.

Note: Figures represent percent of all respondents in each category who expect to shop in that store type. Example: 41% of all respondents 18-24 years old expect to purchase their next dress shirt in a department store while 30% expect to buy in a specialty store. Totals may not add to 100.0% due to rounding.

Neckwear

Men's Neckwear Purchases by Store Type
(Percent of Units Purchased)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Department stores	31.3	33.5
Chain & mail order	17.9	18.2
Discounter outlets	19.8	17.1
Specialty shops	25.8	22.4
Other outlets	5.2	8.8

CONSUMER BUYING HABITS

Neckwear

Men's Neckwear Purchases by Price Point
(Purchases of Units Sold)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Under $2.00	5.3	5.5
$2.00 to $3.99	17.3	24.2
$4.00 to $5.99	31.0	27.3
$6.00 to $7.99	19.9	20.8
$8.00 to $9.99	11.5	9.3
$10.00 to $11.99	7.8	6.2
$12.00 & over	7.2	6.7

Underwear

Discount stores were the favored place of purchase for men's underwear, according to the NPD panel information.

Men's Underwear Purchased by Type
(Percentage of Units Purchased)

	1982	1981
Total	100.0%	100.0%
T-shirts	28.3	30.0
V-necks	5.8	5.5
A-shirts	4.6	5.4
Briefs	51.0	48.1
Boxers	8.4	9.4
Bikinis	1.9	1.6

Men's Underwear Purchases by Store Type
(Percentage of Units Purchased)

	1982	1981
Total	100.0%	100.0%
Chains	17.9	16.2
Department stores	24.0	27.8
Discounters	38.9	36.3
Specialty stores	4.6	4.4
Other outlets	14.6	15.3

CONSUMER BUYING HABITS

Underwear

Underwear Purchases by Price Point
(Percentage of Units Sold)

	1982	1981
Total	100.0%	100.0%
Under $1.00	14.8	19.5
$1.00 to $1.49	30.3	31.9
$1.50 to $1.99	23.5	23.8
$2.00 to $2.99	22.6	20.2
$3.00 & over	8.8	6.6

Source for the above tables: NPD Research.

Hosiery

Men's Hosiery Purchases by Type
(Percentage of Units Purchased)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Dress socks	28.9	29.5
Casual socks	23.9	23.2
Athletic socks	25.2	24.8
Work socks	16.7	17.5
Support socks	1.2	1.5
Other socks	4.1	3.5

Men's Hosiery Purchases by Store Type
(Percentage of Units Sold)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Chains	18.3	18.5
Department stores	15.1	14.4
Discounters	41.0	39.1
Specialty stores	4.7	6.4
Other stores	20.9	21.6

Men's Hosiery Purchases by Price Point
(Percentage of Units Purchased)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Under $ .50	8.0	9.3
$ .50 to $ .99	39.7	46.1
$1.00 to $1.49	27.5	25.1
$1.50 to $1.99	12.8	9.6
$2.00 to $2.49	4.6	4.5
$2.50 & over	7.4	5.4

Source for the above tables: NPD Research.

MEN'S WORK WEAR

Market Trends

Once thought to be recession-proof, men's work wear has proved to be much the same as most other areas of apparel, suffering from the ill-effects of the current recession. Sales of work wear are now estimated to stand at $1.3 billion annually, nearly the same level the category recorded in 1980.

Industry analysts point out that the consumer demand for high-ticket hardgoods has suffered tremendously over the last two years, thus resulting in heavy unemployment among the work wear industry's prime consumers.

Over the last several years the work wear industry has been dependent on consumer acceptance of the category as a fashion fad in order to register major growth. The most recent occurrence of this fad was in 1980 when the "authentic work wear" craze swept the country. This fad, which included such items as painters' pants and bib overalls, brought many non-traditional consumers into the industry, but as the trend faded, no new one replaced it. On the other hand, the preference for casual wear, including jeans, for wear at work has continued to make inroads in the work wear market.

Production of work wear registered a slight 3.8% increase in 1981 despite nearly 40% gains shown by both the coverall, overall and jumpsuit category as well as the overall and work-type jacket group. These gains were nearly offset by an 8.2% decline to 3.3 million units registered by the work shirts category.

Industry studies have found that nearly one out of four workers in the labor force today are supplied with clothes or uniforms by their employers, while another 16% have bought something from the category on their own within the past year.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. During intra-censal periods the Bureau conducts annual surveys among a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Based on estimates resulting from the 1980 Annual Survey of Manufacturers, the value of industry shipments (including both primary and secondary products and miscellaneous receipts) produced by manufacturers classified in the men's work wear industry reached $4.3 billion, a 12.9% increase over the 1979 shipment value of $3.8 billion.

GENERAL STATISTICS ON THE INDUSTRY

AT THE MANUFACTURER LEVEL

Work Wear (SIC 2328*)

	1928(e)	1981(e)	1980	1979	1977
Number of companies	na	na	na	na	347
Number of establishments, total**	na	na	604	605	656
Number with 20 or more employees	na	na	522	528	575
Employees, total (thous.)	105.7	108.1	101.7	105.0	113.7
Production workers (thous.)	93.1	96.8	99.4	94.9	101.6
Payroll (mil. $)	na	na	$ 881.1	$ 775.1	$ 719.4
Value added by manufacture# (mil. $)	$2,332	$2,165	$2,263.3	$1,998.6	$1,765.4
Value of industry shipments## (mil. $)	$4,811	$4,784	$4,290.8	$3,800.9	$3,641.9
Capital expenditures, new (mil. $)	na	na	$ 87.4	$ 66.5	44.1

(e) = estimated
na = not available

*SIC 2328 comprises establishments primarily engaged in manufacturing men's, youths' and boys' work shirts, pants, jeans, and other work clothing and washable service apparel. As noted above, uniforms and career apparel are not included, as they are primarily produced in the tailored clothing industry. For 1977 the 656 establishments (plants) in the industry included 361 manufacturers, 41 jobbers, 91 independent contractors and 163 multiplant company contractors.

**Each business location is counted as a separate establishment. (Data for 1979 and 1980 are from the U.S. Census report, County Business Patterns.)

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The values of primary products (men's work clothing) alone, of these industries, plus the value of shipments by manufacturers classified in other industries who make suits, etc., as secondary products, are shown on page 45.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1979, 1980;
U.S. Bureau of Industrial Economics,
1983 Industrial Outlook.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment in the men's work wear category shrank dramatically between October 1981 and October 1982, falling 5.7%, to 65.6 thousand employees. Production workers representation in the total also shrank, down to 83.5% in 1982 from 83.9% a year earlier.

Average weekly earnings for production workers in the industry in October 1982 jumped to $172.31, up 13.3% from the $152.15 registered in October 1981. The 1982 figure was also well above the annual average of $153.64 recorded for the total year 1981.

Employment & Earnings in the Work Wear Industry

	Monthly Averages			Annual Averages		
	Oct. 1982(p)	Oct. 1981	% Change	1981	1980	% Change 1981/1980
Work clothing (SIC 2328*)						
All employees (thous.)	95.6	101.4	- 5.7%	104.0	100.0	+ 4.0%
Production workers (thous.)	79.8	85.1	- 6.2	86.9	84.3	+ 3.1
Avg. weekly earnings	$172.31	$152.15	+13.3	$153.64	$142.49	+ 7.8
Avg. hourly earnings	$ 4.76	$ 4.18	+13.9	$ 4.13	$ 3.82	+ 8.1
Avg. weekly hours	36.2	36.4	- 0.5	37.2	37.3	- 0.3
Avg. overtime hours	0.9	1.1	-18.2	1.3	1.2	+ 8.3

(p) = preliminary
* For a definition of this SIC code, see page 41.

Source: U.S. Bureau of Labor Statistics, Employment and Earnings.

Firms with less than 250 employees were most prevalent in 1980 in the work clothing industry, according to the U.S. Bureau of the Census. However, firms with over 250 employees were responsible for more than 37% of all employees in the industry in that same year.

Manufacturing Establishments in the Work Wear Industry
By Employment Class Size, 1980

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Men's & boys' work clothing (SIC 2328*), total	604	100.0%	915,545	100.0%
By establishment size:				
Under 50 employees	136	22.5	(D)	--
50 - 99 employees	102	16.9	61,993	6.8
100 - 249 employees	208	34.4	272,493	29.8
250 - 499 employees	124	20.5	342,001	37.4
500 or more employees	34	5.6	(D)	--

*For a definition of this SIC code, see page 41.
(D) Withheld to avoid disclosure.

Source: U.S. Bureau of the Census, County Business Patterns, 1980 (CBP-80-1).

GENERAL STATISTICS ON THE INDUSTRY

Manufacturers' Operating Ratios

Selected Operating Ratios for Manufacturers
In the Work Clothing Industry, 1980
(Median Results)

	Work Clothing (SIC 2328*) (60)**
Current assets to current debt (times)	1.96
Net profits on net sales (percent)	2.59
Profits on net worth (percent)	11.93
Sales to net worth (times)	4.38

*For a definition of this SIC code, see page 41.
**Number in parenthesis refers to the number of reporting companies in the industry.

Source: Dun & Bradstreet,
Key Business Ratios 1980,
All rights reserved.

LOCATION OF THE INDUSTRY

Leading States in the Manufacture of Work Clothing, 1977

	No. of Establishments		Value Added by Manufacturer (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Work clothing (SIC 2328*)				
Leading states:				
Texas	78	70	$ 305.0	$ 588.5
Tennessee	74	70	316.9	642.2
Georgia	57	53	157.9	323.1
Mississippi	49	49	136.6	266.6
Alabama	42	39	81.2	139.2
California	39	22	99.4	279.8
Kentucky	35	34	72.7	137.7
Missouri	36	31	66.5	110.3
New York	32	20	13.0	28.6
U.S. total	656	388	1,765.4	3,641.9
Leading states, total	442	575	1,249.2	2,516.0
Percent of U.S. total	67%	68%	71%	69%

*For a definition of SIC code, see page 41.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

PRODUCTION

Information on production and shipments of work wear is compiled annually by the U.S. Census Bureau and published in the Current Industrial Reports series. This is based on a survey of manufacturers, government contractors and jobbers, except for very small firms (less than five employees).

Production of Specified Types of Work Wear, 1980, 1981

	Thousands of Units		% Change
	1981	1980	1981/1980
Work wear, total (men's only, except where noted)	269,936	292,362	--
Jeans & dungarees	142,340	166,494	- 14.5%
Work pants, incl. waistband overalls	40,620	39,276	*
Coveralls, overalls, jumpsuits	18,036	13,044	+ 38.3
Washable service apparel	18,852	18,324	+ 2.9
Work shirts (men's & boys')	39,204	42,720	*
Uniform shirts	6,804	9,552	- 28.8
Overall & work-type jackets (men's & boys')	4,080	2,952	+ 38.2

*In 1981 the Census Bureau broadened its coverage of the apparel industry, adding manufacturers who were not included in the survey covering 1980. This has affected comparability within product classifications to varying degrees. In the case of work pants, 10% of 1981 production was accounted for by the newly-added manufacturers; in work shirts, 7.0%. Figures for the two years in these classifications are, therefore, not comparable. In other products shown, the effect of the additional reporting manufacturers was very minimal or non-existent.

Source: U.S. Bureau of the Census, Current Industrial Reports, (Series MA-23E(81)-1) (issued December 1982).

By Fabric/Construction

Production of Specified Types of Men's & Boys' Work Wear By Type of Fabric & Construction, 1980, 1981
(Thousands of Dozens)

	1981	% of 1981 Total	1980
Men's jeans & dungarees	11,861	100.0%	13,874
All cotton & chiefly cotton	10,776	90.8	13,527
All man-made & chiefly man-made	665	5.6	347
Fabric, n.s.k.	421	3.6	--

(continued)

PRODUCTION

By Fabric/Construction

Production of Specified Types of Men's & Boys' Work Wear By Type of Fabric & Construction, 1980, 1981

(Thousands of Dozens)

	1981	% of 1981 Total	1980
Men's work pants, incl. waistband overalls	3,385	100.0%	3,273 *
By construction:			
Woven fabric	2,889	85.3	3,156
Knit fabric	57	1.7	117
Construction, n.s.k.	439	13.0	--
By fabric:			
All cotton & chiefly cotton	731	21.6	925
All man-made & chiefly man-made	2,079	61.4	2,042
Fabric, n.s.k.	575	17.0	306
Men's coveralls, overalls & jumpsuits	1,503	100.0%	1,087
By construction:			
Woven fabric	1,385	92.1	1,087
Knit fabric			
Construction, n.s.k.	145	9.6	
By fabric:			
All cotton & chiefly cotton	600	39.9	664
All man-made & chiefly man-made	495	32.9	423
Fabric, n.s.k.	248	16.5	--
Men's washable service apparel			
By fabric:	1,571	100.0%	1,527
All cotton & chiefly cotton	217	13.8	205
All man-made & chiefly man-made	827	52.6	801
All other fabric	100	6.4	128
Fabric, n.s.k.	431	27.4	393
Men's & boys' work shirts	3,267	100.0%	3,560
By fabric:			
All cotton & chiefly cotton	690	21.1	858
All man-made & chiefly man-made	2,302	70.5	2,467
All wool & chiefly wool	275	8.4	235
All other fabric			
Fabric, n.s.k.			
Men's & boys' overall & work type jackets	340	100.0%	246
By fabric:			
All cotton & chiefly cotton	86	25.3	97
All man-made & chiefly man-made	149	43.8	149
Fabric, n.s.k.	105	30.9	---

*See footnote on previous page

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's Outerwear, MA-23E(81)-1.

PRODUCTION

Materials Consumed in Production

Value of Materials Consumed
In the Production of Work Wear, 1972, 1977

	Delivered Cost (mil. $)		
	1977	1972	% Change 1977/1972
Work wear (SIC 2328*):			
Broad woven fabrics	$1,194.5	$521.7	+129.0%
Purchased knitted fabrics	23.8	51.9	- 54.1

*For a definition of this SIC code, see page 41.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

Seasonality in Production

Based on reports from the U.S. Census Bureau on production of men's work wear, June and October are the busiest months for cuttings of both men's work pants and men's work shirts. June accounted for 9.3% of total 1981 cuttings in work pants, while October represented 9.6% of 1981 work shirt cuttings.

Percent of Cuttings Done by Month of Selected Types of Men's Work Wear
1980, 1981

	Men's Work Pants		Men's Work Shirts	
	1981	1980	1981	1980
Total	100.0%	100.0%	100.0%	100.0%
January	8.2	7.5	7.6	8.3
February	7.9	7.5	7.4	8.2
March	8.7	7.6	7.6	8.8
April	8.9	8.3	8.8	9.2
May	8.8	7.7	9.0	8.5
June	9.3	8.4	9.2	8.3
July	7.2	7.0	7.7	7.5
August	8.2	9.0	8.8	7.8
September	8.9	9.4	8.4	7.9
October	9.1	9.2	9.6	9.2
November	8.1	9.6	8.5	8.5
December	6.7	8.8	7.4	7.8

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(81)-1.

SHIPMENTS

The value of shipments of work wear in the following table covers the total value reported by all manufacturers, regardless of the manufacturers' industry classification. This product basis differs from the "industry shipment" data as described in the Industry Section of this report.

The information on product shipments reported below for 1978-1980 are based on findings in a sample survey of manufactures conducted annually by the Census Bureau, to update figures reported every five years in the complete census of manufactures, the latest of which covered the year 1977.

Value of Shipments of Work Wear, 1977-1980
(Millions of Dollars)

	1980	1979	1978	1977	% Change 1980/1979
Men's & boys' work clothing	$4,086.8	$3,625.2	$3,470.5	$3,394.1	+ 12.7%
Men's & boys' work shirts	221.1	255.8	188.3	191.6	- 13.6
Men's & boys' jeans & jean cut casual slacks	2,636.3	2,236.5	2,106.5	1,962.8	+ 17.9
Men's & boys' work clothing, n.e.c.	572.4	509.7	767.8	729.6	+ 12.3
Contract work on men's & boys' work clothing	488.5	404.1	418.0	410.6	+ 20.9
Work clothing, n.s.k.	168.5	219.0	80.0	99.5	- 23.1

n.e.c. = not elsewhere classified
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Annual Survey of Manufacturers,
Value of Product Shipments, M80(AS)-2.

Based on a survey of all manufacturers, government contractors and jobbers, except for very small firms, the U.S. Census Bureau also compiles shipments (as well as production data) for specific types of men's work wear on an annual basis. These are published in the Current Industrial Reports series.

Value of Shipments of Work Wear, 1980, 1981

	Millions of Dollars		% Change
	1981	1980	1981/1980
Work wear, total (men's only, except where noted)	$2,312.7	$2,152.1	--
Jeans & dungarees	1,401.4	1,379.3	+ 1.6%
Work pants, incl. waistband overalls	318.2	268.7	*
Coveralls, overalls, jumpsuits	214.7	155.9	+ 37.7
Washable service apparel	87.1	90.8	*

(continued)

Value of Shipments of Work Wear, 1980, 1981
(continued)

	Millions of Dollars		% Change
	1981	1980	1981/1980
Work shirts (men's & boys')	$ 241.5	$ 225.8	+ 7.0%
Uniform shirts	na	na	--
Overall & work type jackets (men's & boys')	49.8	31.8	+ 56.6

*See footnote on Production of Specified Types of Work Wear, 1980, 1981.
na = not available

Source: U.S. Bureau of the Census, Current Industrial Reports, (Series MA-23E(81)-1) (issued December 1982).

The 1981 annual CIR on gloves and mittens indicates that shipments of work gloves and mittens fell in both quantity and value between 1980 and 1981. However, the all-fabric gloves and mittens categories did manage to register gains in the value of shipments during the period (up 2.4%), but not on a pairage basis.

The all fabric glove category accounts for the largest segment of the work glove industry, accounting for over 80% of all glove shipments on a unit basis.

Quantity & Value of Shipments of Work Gloves & Mittens, 1980, 1981
(Quantity in 1,000 dozen pairs; value in million dollars)

	Quantity		% Change	Value		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Work gloves & mittens, total	24,998	25,181	- 0.7%	$338.9	$340.1	- 0.4%
All-fabric	22,242	22,303	- 0.3	195.0	190.5	+ 2.4
Single canton flannel	4,865	5,560	- 12.5	na	na	
Double canton flannel	4,034	4,035	--	na	na	
Fleeced cotton jersey	4,105	4,329	- 5.2	na	na	
Circular knit cotton	4,168	4,130	+ 0.9	na	na	
Coated & partially coated fabrics	2,694	2,229	+ 20.9	na	na	
All other fabrics	522	541	- 3.5	na	na	
Fabric work gloves & mittens, n.s.k.	1,403	1,407	- 0.3	12.3	12.0	+ 2.5
Leather & fabric combination	903	953	- 5.2	35.3	37.3	- 5.4
All leather work gloves	1,853	1,925	- 3.7	108.6	112.3	- 3.3
All grain, exc. welders	1,053	993	+ 6.0	na	na	
All split, exc. welders	279	324	- 13.9	na	na	
Leather, exc. all grain & all split, incl. welders	378	462	- 18.2	na	na	
Leather work gloves, n.s.k.	141	146	- 3.4	na	na	

na = not available n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Gloves and Mittens, MA-23D(81)-1.

SHIPMENTS

By Region

North Carolina accounted for nearly 20% of all work glove and mitten shipments in the U.S. in 1977 registering the highest percentage of shipments of any state in any category of the men's work wear industry. Tennessee was responsible for 17.7% of all work clothing shipments in 1977 while Texas' 14.5% was the highest percentage in the contract work on men's work wear segment.

Value of Shipments of Work Wear by Leading States, 1977

	Value of Shipments (Mil. $)	% of Total
Work Clothing		
Leading states:		
Tennessee	$ 129.5	17.7%
Texas	127.1	17.4
Kentucky	82.4	11.3
Georgia	48.2	6.6
Indiana	48.0	6.6
Mississippi	44.5	6.1
Missouri	37.7	5.2
California	33.5	4.6
Alabama	23.5	3.2
Arkansas	16.7	2.3
Leading states, total	591.1	81.0
U.S. total	729.7	100.0
Contract work on work clothing		
Leading states:		
Texas	59.6	14.5
Tennessee	50.8	12.4
Alabama	50.6	12.3
Oklahoma	47.1	11.5
Mississippi	31.1	7.6
Georgia	26.1	6.3
Missouri	24.6	6.0
Kentucky	20.7	5.0
North Carolina	13.3	3.2
Pennsylvania	11.6	2.8
Leading states, total	335.5	81.6
U.S. total	411.2	100.0
Work gloves & mittens		
Leading states:		
North Carolina	51.9	19.7
Mississippi	36.2	13.8
Missouri	23.0	8.7
Georgia	16.1	6.1
Pennsylvania	7.6	2.9

(continued)

SHIPMENTS

By Region

Value of Shipments of Work Wear by Leading States, 1977
(continued)

Work gloves & mittens (cont'd.)	Value of Shipments (Mil. $)	% of Total
Illinois	$ 6.4	2.4%
Texas	5.0	1.9
Indiana	4.8	1.8
Michigan	3.9	1.5
Virginia	2.8	1.1
Leading states, total	157.7	60.0
U.S. total	263.0	100.0

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series, MC77-1-23A.

PRODUCER PRICES

Producer (factory) prices in the work wear industry rose at a much slower pace in 1982 than in 1981. The fastest growing category was work pants. The factory prices index rose 4.7% from the preceding year.

Producer Prices for Specified Work Wear, 1980-1982
(1967=100, unless otherwise indicated)

	Annual Averages			% Change	
	1982(p)	1981	1980	1982/1981	1982/1980
All items	299.3	293.4	268.8	+ 2.0%	+ 11.3%
Men's & boys' wear	219.5	210.3	200.4	+ 4.1	+ 9.5
Men's washable service apparel*	99.6	na	na	na	na
Men's one-piece work suits*	98.7	na	na	na	na
Men's work pants	231.4	221.0	212.2	+ 4.7	+ 9.0
Men's dungarees & overalls**	145.1	144.5	130.1	+ 0.4	+ 11.5
Men's & boys' work gloves & mittens	292.7	290.8	267.0	+ 0.7	+ 9.6

*12/81 = 100
**1977 = 100
na = not available

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

RETAIL SALES

The Census of Retail Trade, 1977 provides the only official information on sales by merchandise line in specific types of stores with payrolls. In 1977, department stores accounted for over 56% of the total reported work wear sales amounting to $989.2 million that year. Men's & boys' wear stores and family clothing stores were both far behind department stores, each registering 19.2% of the market.

Reported Sales of Men's Career/Work Wear by Store Type, 1977
(Including Stores With Payrolls Only)

	Stores Reporting Sales		Sales	
	Number*	Percent	Mil. $	Percent
Total**	22,570	100.0%	$989.2	100.0%
Department stores***	5,924	26.2	559.2	56.5
Men's & boys' wear stores	5,442	24.1	190.4	19.2
Family clothing stores	7,573	33.5	189.8	19.2
Other (men's shoe stores & mail order houses)	3,640	16.2	49.8	5.1

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Total is based only on stores which reported sales of career/work wear. Not all store types broke out sales for this category. The above reflects sales in major outlet types.

***Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Family clothing stores had the largest percentage of their sales credited to the career/work wear category in 1977 (6.3%), according to the U.S. Census of Retail Trade. Department stores ranked second with 5.3%, while men's & boys' wear stores held third place with 3.0% in that same year.

Percent of Total Men's & Boys' Wear Sales Accounted For By Men's Career/Work Wear in Specified Store Types, 1977

	Men's & Boys' Wear Sales* (Million $)	% of Sales Accounted For By Men's Career/Work Wear
Department stores**	$10,574.9	5.3%
Men's & boys' wear stores	6,275.4	3.0
Family clothing stores	3,001.5	6.3

*Excludes men's & boys' footwear sales.

**Includes discount department stores as well as traditional department stores. See footnote in table above.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade RC77-L.

CONSUMER BUYING HABITS

Information on men's work shirts and work pants has been supplied by the NPD Textile and Apparel Index, a specialized service of NPD Research, Inc., Port Washington, N.Y. They are based on the findings from an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. (Note that "singles" with their own households are not included. The data includes purchases made for men 17 years of age and over.)

Percent of Purchases by Store Type, 7/81-6/82

	Work Shirts		Work Pants	
	% of Units	% of Dollars	% of Units	% of Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Department stores	9.0	10.2	15.8	16.9
National chains	50.3	54.7	45.6	46.3
Discount stores, incl. K mart	27.2	20.8	23.2	21.3
Men's specialty stores	4.0	4.6	6.2	7.0
Other outlets	2.8	2.8	4.8	4.1
Not reported	6.7	6.9	4.4	4.4

Percent of Purchases by Price Point, 7/81-6/82

	Work Shirts	
	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $5.00	27.3	11.9
$5.00 - $8.99	41.4	38.3
$9.00 - $12.99	23.6	33.5
$13.00 & over	7.7	16.3

	Work Pants	
	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $8.00	10.4	4.3
$8.00-$13.99	53.6	44.4
$14.00 - $19.99	25.7	30.6
$20.00 & over	10.3	20.7

Source for the above tables: NPD Research.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (June)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments. (April)

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00) (1982 Edition available now -- 1983 Edition will be available in July, 1983)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season. (May)

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00) (May)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Fashion Accessories (Men's and Women's)

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TABLE OF CONTENTS

Page

AT THE MANUFACTURER LEVEL:

MARKET TRENDS.. 1
GENERAL STATISTICS ON THE INDUSTRY........................ 1
  EMPLOYMENT & EARNINGS........................ 5
  CONCENTRATION IN THE INDUSTRY........................ 8
  LOCATION OF THE INDUSTRY........................ 10
SHIPMENTS........................ 12
  JEWELRY........................ 15
  HANDBAGS & PURSES........................ 17
  SMALL PERSONAL LEATHER GOODS........................ 17
  LUGGAGE........................ 18
  GLOVES........................ 18
  OTHER ACCESSORIES........................ 19
  BY LEADING STATES........................ 20
  BY LEADING MANUFACTURERS........................ 22
PRODUCER PRICE INDEX........................ 22
FOREIGN TRADE........................ 23
  IMPORTS........................ 24
  EXPORTS........................ 29

AT THE RETAIL LEVEL:

THE SIZE OF THE POTENTIAL MARKET........................ 31
  WORKING WOMEN........................ 32
THE BRIDAL MARKET........................ 33
RETAIL SALES........................ 34
  BY TYPE OF RETAIL OUTLET........................ 35
RETAIL OPERATING RATIOS........................ 39
RETAIL SALES BY MONTH........................ 42
RETAIL ADVERTISING........................ 42
CONSUMER BUYING HABITS........................ 43

SCHEDULE OF ADDITIONAL FACT FILES........................ 45

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FASHION ACCESSORIES

Market Trends

At the outset of 1983, the nation's economy seemed ready to recover from its economic doldrums. During this recessionary period, accessories sales suffered less than other types of apparel as consumers continued to buy these products to accent existing wardrobes without making a major outlay. According to some retail analysts this trend will hold up, at least for the first year of the recovery, because sales of other apparel items will be slowed due to pent-up demand for big-ticket durable goods. Nevertheless, apparel sales are expected to grow about 2.5% in 1983 and an even larger percentage in 1984.

Retail sales of women's accessories are estimated at over $7 million. Dollar volume in men's and boys' accessories is not available; however, a report by the NPD Textiles and Apparel Market Index based on their consumer panel data for the year 1982 showed a 2.3% rise in men's and boys' accessories sales compared with the previous year. In this same period, overall sales of men's and boys' wear increased only 1.1% compared with 1981.

Fashionable styling and colors are the essential ingredients which entice accessory purchases. In women's accessory looks for 1983, bi-color combinations, such as pink, purple, sea green, yellow and brick--often paired with black--are the dominant look. Men's accessories will also employ distinctive styles and colorations to supplement the traditional accessory offerings.

Accessories cannot be defined in a single standard industry classification whose value or size is readily measured due to the large variety of products in the category. Some accessories, notably belts and trimmings such as buckles and the like, are sold either to other apparel manufacturers who use them as part of their finished garments, or at retail, further complicating an accessories retail sales report.

The distinction between items included in the men's furnishings category and in men's accessories is also subject to varying interpretations. Information on men's neckwear, hats and underwear is covered in detail in the Men's Furnishings & Work Wear Fact File and information on men's and women's hosiery is detailed in the Hosiery/Legwear Fact File.

At the Manufacturer Level

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census compiles a complete census of all manufacturers by industry classification every five years--the latest covering the year 1977, and in intercensal years conducts surveys among a representative sample of manufacturers to develop information on key measurements of activity. The most recent survey report is for the year 1980. Supplementing these sources is the U.S. Industrial Outlook, issued annually by the U.S. Bureau of Industrial Economics, which covers estimates on a limited number of industries in apparel and related classifications.

GENERAL INDUSTRY STATISTICS

Accessories manufacturers are part of many separate industry classifications under the Standard Industrial Classification system followed in government data. In some cases, accessories are combined with manufactures of other products (i.e., the Watch & Clock Industry).

	Costume Jewelry			Precious Metal Jewelry		
	(SIC 3691*)			(SIC 3911*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	837	na	na	2,165
Number of establishments, total**	708#	736#	847	1,973#	2,076#	2,206
Number with 20 or more employees	199	203	236	342	420	405
Employees, total (thous.)	23.4	22.4	25.0	36.9	40.8	42.1
Production workers (thous.)	17.7	18.3	17.6	25.3	28.6	29.2
Payroll (mil. $)	$249.4	$219.3	$215.9	$ 469.4	$ 478.2	$ 432.0
Value added by manufacture## (mil. $)	546.9	480.4	485.1	1,160.8	1,193.8	979.8
Value of industry shipments### (mil. $)	989.4	857.6	816.6	2,838.6	2,699.4	2,107.0
Capital expenditures, new (mil. $)	18.9	13.5	17.6	34.9	29.0	25.6

	Watches, Clocks			Apparel Belts		
	(SIC 3873*)			(SIC 2387*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	283	na	na	281
Number of establishments, total**	217#	242#	302	248#	242#	284
Number with 20 or more employees	102	107	112	132	115	119
Employees, total (thous.)	23.0	27.4	31.5	9.5	10.0	9.4
Production workers (thous.)	17.3	21.0	24.0	7.7	8.0	7.3
Payroll (mil. $)	$ 290.6	$ 309.3	$ 316.6	$ 102.5	$ 93.8	$ 76.1
Value added by manufacture## (mil. $)	663.5	672.2	684.5	235.7	213.9	150.1
Value of industry shipments### (mil.$)	1,511.6	1,592.0	1,594.7	422.4	388.4	286.9
Capital expenditures, new (mil. $)	17.6	23.6	23.2	1.6	2.9	2.5

	Fabric Dress & Work Gloves			Leather Gloves		
	(SIC 2381*)			(SIC 3151*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	100	na	na	84
Number of establishments, total**	115#	118#	132	93#	93#	101
Number with 20 or more employees	89	87	92	55	64	66
Employees, total (thous.)	9.6	11.3	10.9	6.1	6.2	5.5
Production workers (thous.)	8.7	10.4	9.9	5.3	5.5	4.7
Payroll (mil. $)	$ 64.0	$ 76.3	$ 69.0	$ 38.9	$ 38.6	$ 33.9
Value added by manufacture## (mil. $)	137.9	173.4	160.9	62.4	70.0	67.6
Value of industry shipments### (mil. $)	280.7	337.2	312.4	180.7	181.0	178.0
Capital expenditures, new (mil. $)	3.6	2.0	3.5	0.9	0.9	1.9

(continued)

GENERAL INDUSTRY STATISTICS

	Women's Handbags (SIC 3171*)			Small Leather Goods (SIC 3172*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	404	na	na	253
Number of establishments, total**	590#	363#	418	241#	240#	260
Number with 20 or more employees	162	181	186	92	90	97
Employees, total (thous.)	21.6	22.0	20.3	10.8	11.8	11.9
Production workers (thous.)	19.2	19.6	18.2	8.3	9.5	9.6
Payroll (mil. $)	$180.3	$164.0	$144.0	$100.9	$105.6	$ 98.2
Value added by manufacture## (mil. $)	303.9	304.3	266.5	247.8	241.5	205.8
Value of industry shipments### (mil. $)	573.4	579.3	505.2	406.3	400.9	366.8
Capital expenditures, new (mil. $)	5.5	4.6	6.6	1.9	3.6	4.8

	Luggage (SIC 3161*)			Millinery (SIC 2351*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	286	na	na	151
Number of establishments, total**	266#	276#	298	105#	108#	151
Number with 20 or more employees	127	132	130	44	46	47
Employees, total (thous.)	20.7	22.0	19.2	2.8	na	2.7
Production workers (thous.)	16.7	17.8	15.8	2.2	na	2.2
Payroll (mil. $)	$229.8	$224.5	$164.1	$20.8	na	$20.2
Value added by manufacture## (mil. $)	527.1	447.8	328.3	35.8	na	32.8
Value of industry shipments### (mil. $)	957.3	872.8	654.9	79.6	na	75.1
Capital expenditures, new (mil. $)	16.3	11.1	8.1	na	na	0.2

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made as shown below:

SIC 3961 covers manufacturers specializing in the production of costume jewelry, costume novelties and ornaments made of all materials except precious metal, etc.

SIC 3911 covers manufacturers specializing in the production of jewelry and other articles worn on or carried about the person, made of precious metals with or without stones, including cigarette cases and lighters, vanity cases and compacts; trimmings for umbrellas and canes; and jewel settings and mountings.

SIC 3873 covers manufacturers specializing in the production of clocks, watches, watchcases, mechanisms for clockwork-operated devices and clock and watch parts, as well as establishments primarily engaged in assembling clocks and watches from purchased movements and cases.

SIC 2387 covers manufacturers specializing in the production of men's and women's apparel belts, regardless of material.

(continued)

GENERAL INDUSTRY STATISTICS

SIC 2381 covers manufacturers specializing in the production of dress, semi-dress, and work gloves and mittens, cut and sewn from purchased woven or knit fabric, or these fabrics combined with leather or plastic.

SIC 3151 covers manufacturers specializing in the production of dress, semi-dress, and work gloves exclusively of leather or leather with lining of other material.

SIC 3171 covers manufacturers specializing in the production of women's handbags and purses of leather or other materials, except precious metals.

SIC 3172 covers manufacturers specializing in the production of small articles, such as billfolds, key cases, and coin purses of leather or other materials, except precious metals.

SIC 3161 covers manufacturers specializing in the production of luggage of leather or other material.

SIC 2351 covers manufacturers specializing in the production of women's, misses', childrens' and infants' millinery.

**Each business location is counted as a separate establishment.

#Includes only establishments with payrolls. This information is from County Business Patterns (U.S. Census Bureau).

##Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

###Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). Available data on the total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) are covered in the value of shipments reported on pages 13 and 14.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977; Annual Surveys of Manufactures, 1979, 1980.

GENERAL INDUSTRY STATISTICS

Estimates on industry shipments for 1981 and 1982, and in some cases for 1983, have been compiled by the U.S. Bureau of Industrial Economics, as noted below.

Estimated Value of Industry Shipments
(Millions of Dollars)

Reported Industries	Current Dollars 1983	Current Dollars 1982	Current Dollars 1981	Constant (1972) Dollars 1983	Constant (1972) Dollars 1982	Constant (1972) Dollars 1981	Compound Annual Rate of Growth 1972-82
Jewelry industries							
Precious metal	$2,950	$2,900	$2,870	nr	nr	nr	+ 9.9%
Costume	1,070	1,050	1,030	nr	nr	nr	+ 8.3
Leather glove industry	nr	167	182	57	59	65	- 4.9
Luggage industry	nr	963	1,024	480	485	516	+ 2.9
Handbag industry	nr	456	518	279	288	320	- 2.3
Small leather goods ind.	nr	393	418	231	238	259	- 0.2

nr = not reported

Source: U.S. Bureau of Industrial Economics, 1983 U.S. Industrial Outlook.

Employment & Earnings

In the first ten months of 1982 the level of employment in those accessories industries covered in U.S. Bureau of Labor Statistics data showed a decline compared with the same 1981 period, with the exception of the precious metals jewelry industry. This is a continuance of the long-term trend in declining employment in domestic accessories industries which have been unable to compete against imports.

Average weekly earnings and hours have, on the other hand, continued to show gains.

Employment & Earnings in Specified Accessories Industries, 1980, 1981 & January-October 1981, 1982

	January-October 1982	January-October 1981	Annual Averages 1981	Annual Averages 1980	Annual Averages % Change 1981/1980
Costume jewelry (SIC 3961)					
All employees (thous.)	21.8	23.7	24.0	25.2	- 4.8%
Production workers (thous.)	16.9	18.3	18.5	19.8	- 6.6
Avg. weekly earnings	$194.00	$180.49	$181.34	$165.84	+ 9.3
Avg. weekly hours	38.2	37.6	37.7	37.1	+ 1.6
Precious metals jewelry (SIC 3911)					
All employees (thous.)	36.9	36.8	37.3	37.2	+ 0.3
Production workers (thous.)	25.9	25.8	26.2	26.3	- 0.4
Avg. weekly earnings	$254.13	$241.00	$246.35	$214.13	+ 15.0
Avg. weekly hours	37.0	37.4	37.9	37.5	+ 1.1

(continued)

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in Specified Accessories Industries, 1980, 1981
& January-October 1981, 1982
(continued)

	January-October		Annual Averages		
	1982	1981	1981	1980	% Change 1981/1980
Women's handbags & personal leather goods (SIC 317)					
All employees (thous.)	27.1	30.1	30.1	30.0	+ 0.3%
Production workers (thous.)	22.1	25.0	24.9	25.4	- 2.0
Avg. weekly earnings	$177.05	$169.09	$170.72	$155.45	+ 9.8
Avg. weekly hours	36.1	36.2	36.4	35.9	+ 1.4
Watches, clocks & watchcases (SIC 387)					
All employees (thous.)	18.0	20.3	20.1	22.3	- 9.9
Production workers (thous.)	12.6	14.9	14.7	16.7	- 12.0
Avg. weekly earnings	$236.17	$222.52	$223.29	$202.26	+ 10.4
Avg. weekly hours	38.6	38.9	38.9	38.6	+ 0.8
Luggage (SIC 316)					
All employees (thous.)	13.3	15.1	15.0	16.3	- 8.0
Production workers (thous.)	9.9	11.5	11.4	12.2	- 6.6
Avg. weekly earnings	$197.67	$193.42	$194.11	$178.36	+ 8.8
Avg. weekly hours	34.7	37.7	37.4	36.4	+ 2.7

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

Employment Size

Number of Accessory Manufacturing Establishments
by Employment Size, 1980

	Costume Jewelry (SIC 3961)		Precious Metal Jewelry (SIC 3911)	
	No.	% of Total	No.	% of Total
Total establishments*	708	100.0%	1,973	100.0%
Employment size:				
Under 10 employees	404	57.1	1,303	66.0
10-49 employees	213	30.1	527	26.7
50-249 employees	75	10.6	124	6.3
250 or more employees	16	2.3	19	1.0

(continued)

GENERAL INDUSTRY STATISTICS

Employment Size

Number of Accessory Manufacturing Establishments by Employment Size, 1980
(continued)

	Watches, Clocks & Watchcases (SIC 387)		Apparel Belts (SIC 2387)		Fabric Dress & Work Gloves (SIC 2381)	
	No.	% of Total	No.	% of Total	No.	% of Total
Total establishments*	217	100.0%	248	100.0%	115	100.0%
Employment size:						
Under 10 employees	85	39.2	77	31.0	16	13.9
10-49 employees	72	33.2	111	44.8	42	36.5
50-249 employees	33	15.2	57	23.0	48	41.7
250 or more employees	27	12.4	3	1.2	9	7.8

	Leather Gloves (SIC 3151)		Women's Handbags (SIC 3171)		Small Leather Goods (SIC 3172)	
	No.	% of Total	No.	% of Total	No.	% of Total
Total establishments*	93	100.0%	344	100.0%	241	100.0%
Employment size:						
Under 10 employees	25	26.9	118	34.3	109	45.2
10-49 employees	36	38.7	140	40.7	78	32.4
50-249 employees	32	34.4	67	19.5	46	19.1
250 or more employees	--	--	19	5.5	8	3.3

	Luggage (SIC 3161)		Millinery (SIC 2351)	
	No.	% of Total	No.	% of Total
Total establishments*	266	100.0%	105	100.0%
Employment size:				
Under 10 employees	82	30.8	41	39.0
10-49 employees	104	39.1	50	47.6
50-249 employees	67	25.2	13	12.4
250 or more employees	13	4.9	1	0.9

*Includes only establishments with payrolls.

Source: U.S. Bureau of the Census,
County Business Patterns 1980.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios of the Leading Manufacturers In Specified Accessories Industries, 1977

	No. of Companies	Value of Industry Shipments (Mil. $)	New Capital Expenditures (Mil. $)	Value Added by Manufacture (Mil. $)
Precious metal jewelry (SIC 3911)	2,165	$ 2,107.0	$ 25.6	$ 979.8
Percent accounted for by:				
4 largest companies	0.2%	18.1%	16.4%	18.2%
8 largest companies	0.4	24.0	22.9	25.1
20 largest companies	1.0	34.6	28.9	35.7
50 largest companies	2.4	48.2	49.4	48.8
Costume jewelry (SIC 3961)	837	$ 816.6	$ 17.6	$ 485.1
Percent accounted for by:				
4 largest companies	0.5%	23.3%	10.5%	25.5%
8 largest companies	1.0	32.5	15.3	34.8
20 largest companies	2.4	47.3	40.8	49.8
50 largest companies	6.0	63.2	73.6	64.7
Watches, clocks & watchcases (SIC 3873)	283	$ 1,594.7	$ 23.2	$ 684.5
Percent accounted for by:				
4 largest companies	1.4%	58.1%	44.8%	52.1%
8 largest companies	2.8	64.2	52.7	61.0
20 largest companies	7.0	79.6	84.7	80.1
50 largest companies	17.6	91.6	92.6	92.8
Women's handbags (SIC 3171)	404	$ 505.2	$ 6.6	$ 266.5
Percent accounted for by:				
4 largest companies	1.0%	21.4%	30.8%	18.5%
8 largest companies	2.0	30.8		26.8
20 largest companies	5.0	48.1	45.8	45.1
50 largest companies	12.4	70.4	64.2	67.6
Personal leather goods (SIC 3172)	253	$ 366.8	$ 4.8	$ 205.8
Percent accounted for by:				
4 largest companies	1.6%	38.3%	35.4%	38.9%
8 largest companies	3.2	49.4	na	50.5
20 largest companies	7.9	66.9	64.6	65.7
50 largest companies	19.8	85.7	90.9	85.4

(continued)

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios of the Leading Manufacturers In Specified Accessories Industries, 1977 (continued)

	No. of Companies	Value of Industry Shipments (Mil. $)	New Capital Expenditures (Mil. $)	Value Added by Manufacture (Mil. $)
Fabric dress & work gloves (SIC 2381)	100	$ 312.4	$ 3.5	$ 160.9
Percent accounted for by:				
4 largest companies	4.0%	44.5%	na	46.7%
8 largest companies	8.0	63.1	na	65.1
20 largest companies	20.0	82.4	na	83.5
50 largest companies	50.0	95.8	na	96.1
Leather gloves & mittens (SIC 3151)	84	$ 178.0	$ 1.9	$ 67.6
Percent accounted for by:				
4 largest companies	4.8%	38.2%	10.7%	29.5%
8 largest companies	9.6	53.9	20.8	47.0
20 largest companies	23.9	78.7	43.8	72.7
50 largest companies	59.6	96.9	98.2	96.2
Luggage (SIC 3161)	286	$ 654.9	$ 8.1	$ 328.3
Percent accounted for by:				
4 largest companies	1.4%	39.5%	40.8%	36.7%
8 largest companies	2.8	49.9	57.3	47.8
20 largest companies	7.0	65.9	65.8	63.2
50 largest companies	17.5	84.6	85.4	83.6
Apparel belts (SIC 2387)	281	$ 286.9	$ 2.5	$ 150.3
Percent accounted for by:				
4 largest companies	1.4%	20.8%	14.7%	22.8%
8 largest companies	2.8	32.3	24.1	33.3
20 largest companies	7.1	51.0	46.0	49.4
50 largest companies	17.8	71.0	69.5	69.7
Millinery (SIC 2351)	151	$ 75.1	$ 0.2	$ 32.8
Percent accounted for by:				
4 largest companies	2.6%	18.7%	8.2%	11.9%
8 largest companies	5.2	27.8	20.0	24.4
20 largest companies	13.1	48.2	46.5	45.9
50 largest companies	33.0	78.8	77.7	78.2

na = not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing
MC77-SR-9

GENERAL INDUSTRY STATISTICS

Location of the Industry

Rhode Island manufacturing plants produced more than half of the total U.S. value of costume jewelry shipments in 1977. Plants in New York State accounted for 50% of the total shipment value of U.S.-made handbags and purses, 42% of precious metal jewelry shipments in dollars and a third of the shipment value of apparel belts in 1977.

Leading States in the Manufacture of Specified Accessories, 1977

	No. of Establishments		Value Added by Manufacture	Value of Shipments
	Total	With 20+ Employees	(Mil. $)	(Mil. $)
Costume jewelry (SIC 3961)				
Leading states:				
Rhode Island	315	119	$ 248.8	$ 428.4
New York	207	52	66.2	115.2
California	86	18	24.7	36.9
Massachusetts	49	17	70.4	114.0
Connecticut	12	5	41.5	65.9
U.S. total	847	236	485.1	816.6
Leading states, total	669	211	451.6	760.4
Percent of U.S. total	79%	89%	93%	93%
Precious metal jewelry (SIC 3911)				
Leading states:				
New York	759	171	346.0	893.2
Rhode Island	295	69	190.1	370.2
California	254	25	67.0	122.6
Massachusetts	76	25	90.6	162.4
New Jersey	66	20	54.8	114.5
Texas	58	12	49.4	83.4
U.S. total	2,206	405	979.8	2,107.0
Leading states, total	1,508	322	797.9	1,746.3
Percent of U.S. total	68%	79%	81%	83%
Watches, clocks & watchcases (SIC 3873)				
Leading states:				
New York	71	30	110.3	255.6
California	52	7	18.4	36.2
New Jersey	21	10	18.2	34.5
Illinois	18	7	63.8	139.4
Michigan	16	8	35.7	70.3
Pennsylvania	12	8	16.5	43.6
U.S. total	303	113	685.6	1,597.8
Leading states, total	190	70	262.9	579.6
Percent of U.S. total	63%	62%	38%	36%

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Leading States in the Manufacture of Specified Accessories, 1977
(continued)

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Women's handbags & purses (SIC 3171)				
Leading states:				
New York	195	100	$ 130.7	$ 254.7
California	53	17	21.6	38.7
New Jersey	21	12	33.1	61.0
Texas	17	7	7.8	16.1
Massachusetts	15	6	7.4	12.9
Connecticut	7	6	11.7	23.8
U.S. total	418	186	266.5	505.2
Leading states, total	308	148	212.3	407.2
Percent of U.S. total	74%	80%	80%	81%
Personal leather goods (SIC 3172)				
Leading states:				
New York	79	39	46.9	95.6
California	34	4	5.3	11.7
Massachusetts	23	8	31.0	49.8
New Jersey	13	8	17.0	26.5
U.S. total	260	97	205.8	366.8
Leading states, total	149	59	100.2	183.6
Percent of U.S. total	57%	61%	49%	50%
Leather gloves & mittens (SIC 3151)				
Leading states:				
New York	30	16	15.3	50.8
Wisconsin	18	13	10.4	20.6
Illinois	9	7	5.4	14.9
Texas	4	4	6.3	12.8
U.S. total	101	66	67.6	178.0
Leading states, total	61	40	37.4	99.1
Percent of U.S. total	60%	61%	55%	56%
Fabric dress & work gloves (SIC 2381)				
Leading states:				
North Carolina	14	13	27.2	59.2
Missouri	6	6	14.9	27.8
Alabama	3	3	11.3	21.7
Georgia	8	7	8.0	16.3
New York	21	7	6.4	12.3
Mississippi	11	10	na	na
U.S. total	132	92	160.9	312.4
Leading states, total*	52	36	67.8	137.3
Percent of U.S. total*	39%	39%	42%	44%

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Leading States in the Manufacture of Specified Accessories, 1977 (continued)

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Apparel belts (SIC 2387)				
Leading states:				
New York	142	55	$ 48.4	$ 95.0
California	42	9	13.0	21.2
Texas	15	13	17.9	29.6
Pennsylvania	12	6	7.4	14.0
Massachusetts	11	7	9.3	16.5
Connecticut	7	4	20.7	32.3
U.S. total	284	119	150.3	286.9
Leading states, total	229	94	116.7	208.6
Percent of U.S. total	81%	79%	78%	73%
Millinery (SIC 2351)				
Leading state:				
New York	95	26	19.9	46.0
U.S. total	151	47	32.8	75.1
Percent of U.S. total	63%	55%	61%	61%
Luggage (SIC 3161)				
Leading states:				
New York	75	39	60.8	114.9
California	36	12	19.0	37.7
Illinois	28	7	9.7	15.4
New Jersey	20	13	23.5	51.1
Pennsylvania	13	7	14.9	32.5
Tennessee	9	5	27.0	44.3
U.S. total	298	130	328.3	654.9
Leading states, total	181	83	154.9	295.9
Percent of U.S. total	61%	64%	47%	45%

*"Value Added by Manufacture" total and "Value of Shipments" total excludes figures from Mississippi plants.

Source: Based on U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

SHIPMENTS

The complete census of manufactures which is conducted every five years by the U.S. Census Bureau (the most recent covering operations in 1977) provides the most detailed information available on U.S. manufactures of accessories items. However, even that source does not provide data in sufficient detail to cover all the many types of accessory items for men and for women.

SHIPMENTS

In intercensal years the U.S. Bureau of the Census compiles surveys among manufacturers to develop information on key manufacturing statistics. A limited number of accessory categories are covered in these surveys, the latest available of which is for the year 1980. Findings compared with 1977 census data are reported in the following table.

Summary of Value of Shipments
By All U.S. Producers of Specified Accessories, 1977, 1979, 1980

	Value of Shipments (Million $)		
	1980	1979	1977(r)
Specified accessories, total	--	--	$5,449.7
Jewelry, precious metal & costume jewelry	$5,481.0	$5,109.4	2,689.4
Precious metal jewelry	2,740.5	2,554.7	1,907.7
Platinum and karat gold jewelry	1,905.7	1,757.9	1,251.5
Other precious metal jewelry	528.6	531.2	353.0
Jewelry, n.s.k.	306.2	265.6	303.2
Costume jewelry	857.2	772.2	781.5
Watches	630.0	725.1	772.0
Watches with imported movements or modules	389.0	369.9	300.7
Watches with domestic movements or modules, clock cases & parts	241.0	355.2	471.3
Apparel belts*	362.4	340.1	244.3
Women's & children's	nr	nr	71.4
Men's & boys'	nr	nr	132.7
Other, n.s.k.	--	--	40.2
Dress & semi-dress gloves & mittens	63.7	68.1	56.3**
Leather	24.7	29.6	27.1
Fabric	12.7	13.0	9.5
Leather & fabric combination	16.5	14.9	8.8
Made in knitting mills	9.8	12.2	9.9
Small personal leather goods	426.4	407.0	369.2
Handbags & purses	501.0	491.3	436.2
Millinery	nr	nr	74.2
Luggage	808.1	728.7	585.3

(continued)

Summary of Value of Shipments
By All U.S. Producers of Specified Accessories, 1977, 1979, 1980
(continued)

	Value of Shipments (Million $)		
	1980	1979	1977(r)
Other accessories	--	--	$ 222.8
Cotton handkerchiefs	nr	nr	27.0
Umbrellas, parasols & canes	nr	nr	36.0
Sun or glare glasses & sungoggles, ready-made	nr	nr	130.8
Women's, misses' & juniors' scarfs, dickies & neckwear	nr	nr	29.0

*Excludes belts made and sold as part of garments.
**Includes types not specified by kind.
(r) = revised
nr = not reported
n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977; Annual Survey of Manufactures, 1979, 1980; Current Industrial Reports MA-23D (Gloves)

Estimates on total shipments of selected products are compiled annually by the U.S. Bureau of Industrial Economics. These figures cover shipments by all U.S. producers regardless of primary industry classification.

Measured in constant 1972 dollars, which eliminates the effects of inflation, the value of shipments of leather accessories--gloves, handbags, luggage and personal leather goods--fell about 8% in 1982 compared with 1981. On a current dollar basis, the value of shipments, which totaled $1.8 billion in 1982, was 7.5% below 1981. Further declines are expected in all sectors in 1983.

Imports are the major cause of the decline in shipments by U.S. manufacturers. All operations are highly labor-intensive and overseas production costs fall far below those within this country. The import-to-apparent consumption ratio for handbags was 52% in 1982; for luggage, 30%; for leather gloves and mittens, 27%; for personal leather goods, 27%.

The value of product shipments of precious metal and costume jewelry was expected to total $3.7 billion in 1982, just slightly higher than in 1981. With the downturn in the economy, consumer demand was weak despite lower gold and diamond prices, and there was also an increase in competition from imports, especially Italian jewelry.

SHIPMENTS

The precious jewelry industry is labor-intensive, employing highly skilled workers, and direct sales to retailers account for a substantial portion of manufacturers' sales. In contrast, the costume jewelry industry is less labor-intensive, and the largest share of costume jewelry is distributed to retailers through wholesalers.

Consumer resistance to purchasing higher priced jewelry--$400 and up--was expected to continue into early 1983 although this could change if the economy picks up at a faster-than-expected rate.

Estimated Value of Product Shipments (By All Producers)
(Millions of Dollars)

	Current Dollars			Constant (1972) Dollars			Compound Annual Rate of Growth
	1983	1982	1981	1983	1982	1981	1972-82
Jewelry							
Precious metal	$2,850	$2,800	$2,770	nr	nr	nr	+ 11.0%
Costume	925	910	895	nr	nr	nr	+ 7.5
Leather accessories	--	1,761	1,905	937	959	1,040	na
Leather gloves	nr	137	149	46	48	53	- 4.2
Luggage	nr	813	865	406	410	436	- 1.0
Handbags	nr	398	452	243	251	279	- 3.2
Small leather goods	nr	413	439	242	250	272	- 3.2

na = not available
nr = not reported

Source: U.S. Bureau of Industrial Economics, 1983 U.S. Industrial Outlook

Within the accessories classifications that are covered in government data it is necessary to go back to the 1977 Census of Manufactures Industry Reports for shipment information in any detail. Available details from this source are covered in the following tables.

Value of Shipments of Jewelry (By All U.S. Producers), 1977
(Millions of Dollars)

		% Change 1977/1972
Precious metal jewelry, total	$ 1,907.7	+ 94.3%
Jewelry made of platinum metals & karat gold	1,251.5	+ 90.6
Rings, complete	445.8	+ 24.5
Wedding rings	133.2	+ 22.0
Other rings	312.6	+ 25.6
Ring mountings	69.3	+ 1.9
Women's & children's jewelry such as necklaces, bracelets, brooches, pins, earrings, etc.	327.8	+146.3

(continued)

SHIPMENTS

Value of Shipments of Jewelry (By All U.S. Producers), 1977
(Millions of Dollars)
(continued)

		% Change 1977/1972
Bracelets for watches	$ 31.4	+ 49.5%
Organizational jewelry	44.7	+ 73.9
Other, including men's, religious, cigarette cases, lighters, compacts, vanity cases, etc.	52.3	+ 20.5
Jewelry, not specified by kind	108.0	na
Jewelry made of gold filled, rolled goldplate & sterling silver	353.0	+ 97.7
Rings & ring mountings	35.3	- 10.6
Men's jewelry	33.0	+159.8
Women's & children's jewelry	184.3	+182.7
Bracelets for watches	38.1	+ 16.1
Other jewelry	38.1	+ 74.8
Jewelry, not specified by kind	24.1	na
Other jewelry not specified by kind	303.1	+106.7
Costume jewelry, total	781.5	+ 76.9
Base metal:		
Rings & ring mountings	567.5	+ 94.3
Men's jewelry, excluding watch attachments & rings	43.3	+ 50.3
Women's & children's jewelry & costume novelties	402.3	+165.4
Bracelets for watches & fraternal, college & school jewelry	43.2	- 26.3
Other jewelry, including religious	25.6	+ 9.9
Imitation pearls	14.3	+ 44.4
Compact & vanity cases	36.2	+133.5
Other costume jewelry made of plastics, wood, leather, etc.	42.0	+ 17.3
Costume jewelry, not specified by kind	121.4	+ 37.3

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

SHIPMENTS

Value of Shipments of Handbags & Purses By All U.S. Producers, 1977
(Millions of Dollars)

		% Change 1977/1972
Women's handbags & purses, total	$ 436.2	+ 26.6%
All leather & chiefly leather	109.4	+ 62.8
Plastics or chiefly plastics	154.6	- 21.5
Other materials, except precious metals	53.2	+ 90.7
Women's handbags & purses, n.s.k.	119.0	+127.1

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

Value of Shipments by All U.S. Producers of Small Personal Leather Goods, 1977
(Millions of Dollars)

		% Change 1977/1972
Personal leather goods, total	$ 369.2	+ 59.3%
Billfolds, wallets, French purses & clutches	136.0	+ 46.2
Leather	125.3	+ 58.8
Other than leather (plastic, fiber, etc.)	10.7	- 24.1
Travel kits (fitted & unfitted)	21.9	+108.6
Jewelry boxes & cases	47.1	+102.1
Other personal goods (key, cigarette, eyeglass & vanity cases, cosmetics bags, etc.)	97.9	+ 38.9
Leather	55.8	na
Other than leather (plastic, fiber, etc.)	42.1	na
Small leather goods, n.s.k.	66.3	+ 92.2

na = not available.
n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

The 1977 census data on luggage included information on both quantity and value of shipments, by type of luggage.

Quantity & Value of Shipments of Luggage By All U.S. Producers, 1977

	Quantity		Value	
	Thous. Units	% Change 1977/1972	Mil. $	% Change 1977/1972
Luggage, total	na	na	$ 585.3	+ 81.8%
Women's hand luggage, all types except zippered	5,123	- 29.7%	107.2	+ 15.9
Soft side (lock construction)	1,946	+ 4.9	35.5	+ 23.7
Other (including hard side & fully or semi-molded)	3,177	- 41.5	71.7	+ 12.4
Men's hand luggage, all types except zippered	2,957	+ 15.1	65.8	+ 43.3
Molded (fully or semi-molded)	1,559	+ 12.2	35.7	+ 52.6
Other (including hard & soft side)	1,398	+ 18.6	30.1	+ 33.8
Men's & women's zippered hand luggage	9,917	+ 37.0	147.1	+164.6
Occupational luggage cases, sample cases, etc.	3,570	+ 42.6	32.5	+ 85.7
Trunks, hand trunks & lockers	1,620	+ 63.6	19.3	+127.1
Briefcases, envelopes, school bags	5,395	+236.3	27.8	+124.2
Attache cases	3,876	+ 87.7	58.3	+163.8
Other (musical instrument cases, etc.)	na	na	47.6	+ 80.3
Luggage, n.s.k.	na	na	79.7	+ 94.4

na = not available. n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

Gloves

Information on the quantity and value of leather and fabric gloves and mittens is collected annually by the Census Bureau as part of their Current Industrial Report series. The report is based on a sample of U.S. glove and mitten manufacturers. According to this source, shipments of dress and semidress gloves and mittens rose 7.1% in value in 1982 to $68.2 million. At a shipment value of $30.2 million, all leather gloves constituted almost half of the total shipment value. The quantity of dress and semidress gloves and mittens shipped in 1982 increased 3.8% to 3,183 thousand dozen pairs.

SHIPMENTS

Gloves

Quantity & Value of Shipments of Gloves & Mittens By All U.S. Producers, 1980, 1981

	Quantity (Thous. Doz.)			Value (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Dress & semidress gloves & mittens, total	3,183	3,065	+ 3.8%	$ 68.2	$ 63.7	+ 7.1%
By material:						
All knit fabric, seamless	636	693	- 8.2	8.5	9.8	- 13.3
Leather & fabric combination	226	272	- 16.9	15.7	16.5	- 4.8
All leather	365	281	+ 30.0	30.2	24.7	+ 22.3
All knit fabric, seamed & cut All woven fabric	1,778	1,641	+ 8.3	11.4	10.2	+ 11.8
Fabric dress & semidress gloves & mittens, n.s.k.	178	178	--	2.4	2.5	- 4.0

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Current Industrial Report,
Gloves & Mittens MA-23D(81)-1.

Belts

According to the Annual Survey of Manufactures, belt shipments reached $362.4 million in 1980, 6.6% above the 1979 shipment value of $340.1. Leather belts shipped during 1980 accounted for only 47% of the total shipment value.

Value of Shipments of Apparel Belts By All U.S. Producers, 1979, 1980

	Value of Shipments (Mil. $)		
	1980	1979	% Change 1980/1970
Apparel belts, total	$ 362.4	$ 340.1	+ 6.6%
Leather belts	170.5	179.2	- 4.9
Belts, other than leather	150.8	128.2	+ 17.6
Apparel belts, n.s.k.	41.1	32.7	+ 25.7

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1980

Other Accessories

For other accessories not specifically mentioned in the previous sections, the most recent information on the quantity and value of shipments is provided by the 1977 Census of Manufactures.

SHIPMENTS

Other Accessories

Quantity & Value of Shipments of Specified Accessories By All U.S. Producers, 1977

	Quantity		Value	
	Thous. Units	% Change 1977/1972	Mil. $	% Change 1977/1972
Millinery, total	na	na	$ 74.2	+ 26.4%
Fur-felt & wool-felt millinery	2,580	+ 13.8%	12.5	+ 78.6
Fabric millinery, including ribbon & pile fabrics	5,952	+ 9.0	12.3	+ 7.9
All other millinery	1,680	- 46.6	14.7	+ 9.7
Millinery, n.s.k.	na	na	34.7	+ 29.0
Cotton handkerchiefs, except embroidered	77,616	- 58.5	27.0	- 3.6
Umbrellas, parasols & canes	na	na	36.0	- 4.8
Sun or glare glasses & sunglasses, ready made	na	na	130.8	+ 39.3
Women's, misses' & juniors' scarfs, dickies & other neckwear	22,992	na	29.0	na

na = not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

By Leading States

Value of Shipments of Specified Accessories by Leading States, 1977

	Value of Shipments (Mil. $)	% of Total
Jewelry made of platinum metals & karat gold		
Leading states:		
New York	$ 608.2	48.6%
Massachusetts	105.6	8.4
Rhode Island	102.1	8.2
New Jersey	82.7	6.6
California	81.9	6.5
Leading states, total	980.5	78.3
U.S. total	1,251.5	100.0
Other jewelry made of precious metals		
Leading states:		
Rhode Island	191.0	54.1
New York	51.1	14.5

(continued)

SHIPMENTS

By Leading States

Value of Shipments of Specified Accessories by Leading States, 1977
(continued)

	Value of Shipments (Mil. $)	% of Total
Other jewelry made of precious metals (cont'd.)		
Massachusetts	$ 33.5	9.5%
New Mexico	14.8	4.2
California	9.5	2.7
Leading states, total	299.9	85.0
U.S. total	353.0	100.0
Watches with imported movements or modules		
Leading state:		
New York	152.1	43.1
U.S. total	353.0	100.0
Watches with domestic movements or modules		
Leading states:		
New York	29.5	6.3
California	12.1	2.6
Leading states, total	41.6	8.9
U.S. total	471.3	100.0
Leather belts		
Leading states:		
New York	32.2	20.7
Connecticut	23.3	15.0
Texas	21.0	13.5
California	10.3	6.6
Leading states, total	86.8	55.8
U.S. total	155.5	100.0
Belts, other than leather		
Leading state:		
New York	37.4	64.3
U.S. total	58.2	100.0
Fabric dress gloves & mittens (including leather and fabric combinations)		
Leading state:		
New York	7.9	30.3
U.S. total	26.1	100.0

Source: Based on U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

SHIPMENTS

By Leading Manufacturers

More than half of the total $1.2 billion shipment value of platinum metal or karat gold jewelry in 1977 was produced by the 50 largest domestic jewelry manufacturers. The 50 largest U.S. manufacturers of watches, clocks and watchcases accounted for 92% of the entire 1977 shipment value of $1.3 billion.

Value of Shipments of Specified Accessories Accounted For By the 50 Largest U.S. Manufacturers of Each Item, 1977

	Value of Shipments* (Mil. $)	Percent Accounted For By:			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Jewelry, precious metals	$ 1,907.7	13	19	30	44
Of platinum metals or karat gold	1,251.5	21	28	41	57
Other jewelry of precious metals	353.0	23	35	52	72
Watches, clocks & watchcases	1,332.0	51	59	76	91
Watches with imported movements	300.7	74	90	na	100
Watches with domestic movements & parts for watches & clocks	471.3	84	93	99	100
Apparel belts	244.3	19	29	45	67
Leather belts, sold separately	155.5	27	42	64	87
Other than leather	58.2	22	33	53	85
Other Accessory Items:					
Costume jewelry & novelties	781.5	17	26	41	58
Dress & work gloves & mittens, leather	121.9	33	44	66	92
Women's & children's handbags & purses	436.2	15	25	43	67
Personal leather goods	369.2	40	50	65	82
Millinery	74.2	19	28	48	78
Suitcases, briefcases, bags, musical instrument cases	585.3	41	51	66	82

* Value of shipments from all producers, regardless of industry classification.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing
MC77-SR-9

PRODUCER PRICE INDEX

Producer (factory) prices for all commodities increased 2.0% in 1982 compared with the previous year. Due to lower prices of gold and other precious metals, the producer price of most jewelry items declined. The most notable decline was for gold wedding rings, which fell 15.8% at the factory price level in 1982 and a combined 32.0% since 1980.

PRODUCER PRICE INDEX

Producer Price Index of Specified Accessories, 1980-1982
(December 1978 = 100 unless otherwise indicated)

				% Change	
	1982(p)	1981	1980	1982/ 1981	1982/ 1980
All commodities (1967=100)	299.3	293.4	268.8	+ 2.0%	+ 11.3%
Jewelry, platinum & karat gold	174.2	186.9	218.7	- 6.8	- 20.3
Ring, ladies', high fashion	170.1	169.9	196.2	+ 0.1	- 13.3
Ring, ladies', engagement, 14 karat gold	na	157.5	181.3	--	--
Ring, wedding, gold	203.8	242.2	299.8	-15.8	- 32.0
Earrings, 14 karat gold	174.2	182.3	205.3	- 4.4	- 15.1
Other precious metal jewelry	164.4	166.2	163.1	- 1.1	+ 0.8
Ring, ladies' & men's, sterling	191.2	203.8	206.2	- 6.2	- 7.3
Bracelet, ladies', gold filled	148.2	143.6	138.1	+ 3.2	+ 7.3
Costume jewelry	126.3	119.5	110.9	+ 5.7	+ 13.9
Ring, ladies', costume	104.7	100.3	106.3	+ 4.4	- 5.6
Earrings, children's, costume	130.7	128.6	117.9	+ 1.6	+ 10.9
Necklace, ladies', costume	na	114.4	na	--	--
Wristwatch, women's, imported movement (17 jewel/quartz) (1967=100)	204.9	219.0	179.3	- 6.4	+ 14.3
Wristwatch, men's imported movement (1967=100)	167.2	171.2	163.1	- 2.3	+ 2.5
Men's dress leather gloves (1967=100)	332.8	328.0	311.1	+ 1.5	+ 7.0
Luggage & small leather goods (1967=100)	200.9	193.6	172.8	+ 3.8	+ 16.3
Week-end case, women's, non-leather (1967=100)	na	223.8*	198.7	--	--
Attache case, non-leather (1967=100)	199.9	187.5	182.3	+ 6.6	+ 9.6

(p) = preliminary
*January-September 1981 average.
na = not available

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

As previously noted in the section on SHIPMENTS, much of the decline in U.S. accessories manufacturing has been due to the inroads made by imports. U.S. producers are unable to compete on a cost basis. In the entire luggage and personal leather goods sector, according to the Department of Commerce, the import-to-apparent consumption ratio was over 40% in 1982, up 10% in the past five years. For handbags, the ratio was 52%; for luggage, 30%; for leather gloves, 27%; for personal leather goods, 27%.

FOREIGN TRADE

It was pointed out in the Department of Commerce report that two industries in the group, luggage and personal leather goods, had achieved some real growth through the 1970's but have declined in real terms since 1980 because of their loss in market to imports. With the exception of handbags from Italy, most U.S. handbag imports carry low unit prices and are made chiefly of materials other than leather. These imports come mainly from Taiwan, Hong Kong, Korea and China, where labor is cheap.

In jewelry, imports into the U.S. represented 21.7% of apparent consumption of precious metal jewelry in 1982, and 18.8% of costume jewelry. Exports, on the other hand, accounted for 5.7% of U.S. precious metal jewelry shipments, 7.5% of costume jewelry shipments.

According to the U.S. Bureau of Industrial Economics, costume jewelry imports were slightly higher in 1982, reaching $195 million, but had gained 13% in 1981 over 1980. Costume jewelry manufacturers and retailers imported an increasing share of their stocks, and Taiwan, Hong Kong, Korea, and Japan accounted for three-fourths of all U.S. imports of costume jewelry. U.S. exports amounted to an estimated $68 million in 1982, about 10% less than in 1981.

Following a 28% increase in 1981, precious jewelry imports rose an estimated 6% in 1982 reaching $730 million. Italy is the world's largest manufacturer and exporter of precious jewelry and controls more than half of all U.S. imports. Another 30% originates in Hong Kong, Switzerland and Israel. Meanwhile, U.S. exports of precious jewelry declined 30% in 1981, a decline partially reflecting lower gold and gem prices.

Detailed information on imports and exports of specified types of accessories items, as compiled in U.S. Census Bureau data, are reported in the following tables.

Imports

Summary of U.S. Imports of Specified Accessories, January - September 1981, 1982

(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Jewelry & religious articles, total	nr	nr	--	$691.8	$584.0	+ 18.5%
Watches & watchcases, total	57,361.5	50,757.4	+ 13.0%	498.4	584.8	- 14.8
Watch movements, total	9,875.8	9,942.4	- 0.7	46.7	67.6	- 30.9
Watch bracelets, total	2,544.8	2,624.9	- 3.0	34.1	38.6	- 11.7
Handbags, reported separately, total	121,191.7	114,590.3	+ 5.8	333.5	300.3	+ 11.0
Handbags & luggage, reported together, total	4,488.5	9,610.7	- 53.3	14.8	23.1	- 35.9
Handbags, flat goods & luggage reported together, total	nr	nr	--	5.0	4.3	+ 16.3

(continued)

FOREIGN TRADE

Imports

Summary of U.S. Imports of Specified Accessories, January - September 1981, 1982

(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Luggage, reported separately, total	nr	nr	--	$270.1	$234.7	+ 15.0%
Flat goods, reported separately, total	nr	nr	--	70.8	66.3	+ 6.8
Gloves & glove linings, total (thous. doz. pairs)	22,203.2	21,223.0	+ 4.6%	145.1	139.6	+ 3.9
Gloves, horse or cowhide	3,574.9	3,662.7	- 2.4	57.2	59.1	- 3.2
Gloves, of leather, nspf	206.3	195.0	+ 5.8	10.7	10.2	+ 4.9
Other gloves & glove linings	18,422.0	17,365.3	+ 6.1	77.2	70.3	+ 9.8
Mufflers, scarfs & shawls, etc.	nr	nr	--	16.2	26.6	- 39.1
Handkerchiefs, total (thous. doz.)	2,573.2	4,000.3	- 35.7	8.9	13.5	- 34.1
Headwear, total	nr	nr	--	96.8	105.8	- 8.5
Leather belts	nr	nr	--	26.9	26.0	+ 3.5
Umbrellas	22,691.1	20,556.9	+ 10.4	38.7	34.8	+ 11.2

nr = not reported. nspf = not specially provided for.

* The c.i.f. value is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census, U.S. General Imports FT 135, September 1981, 1982.

Imports of watches (excluding watchcases) were valued at $778.4 million in 1981. The bulk of imported watches contained movements of fewer than eight jewels (83.4% of total import value). In terms of quantity, 66.4 million watches were shipped to the U.S. in 1981, 63.7 million with at most a seven jewel movement. Watchcase imports declined 13.1% in value to $23.3 million from $26.8 million in 1980 as the quantity imported fell 43.4% to 6.0 million. One hundred million dollars' worth of watch movements were imported in 1981, more than double the 1980 value.

Imports

U.S. Imports of Specified Accessories, 1980, 1981

(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Jewelry & religious articles, total	nr	nr	--	$903.5	$693.3	+ 30.3%
Nonprecious metal jewelry	nr	nr	--	144.8	121.8	+ 18.9
Precious metal jewelry, set or unset	nr	nr	--	684.0	525.3	+ 19.6
Precious stones & pearls	nr	nr	--	74.7	46.2	+ 61.7
Watches & watchcases, total	72,425.8	63,133.9	+ 14.7%	801.7	711.6	+ 12.7
Not over 7 jewels	63,710.1	49,065.7	+ 29.8	649.5	537.0	+ 20.9
8-17 jewels	2,531.8	3,274.2	- 22.7	88.7	102.5	- 13.5
Over 17 jewels	138.5	119.6	+ 15.8	39.9	45.3	- 11.9
Watchcases	6,045.4	10,674.4	- 43.4	23.3	26.8	- 13.1
Watch movements, total	17,367.8	7,829.2	+121.8	100.0	47.9	+108.8
Not over 1 jewel	15,396.8	5,567.1	+176.6	76.3	16.1	+373.9
2-7 jewels	1,545.5	1,114.0	+ 38.7	17.5	16.1	+ 8.7
8-15 jewels	25.2	53.8	- 53.2	0.8	0.8	--
16-17 jewels	390.3	1,080.3	- 63.9	4.6	13.4	65.7
Over 17 jewels	10.0	14.0	- 28.6	0.8	1.5	- 46.7
Watch bracelets of nonprecious materials, total (thous. doz.)	3,817.1	3,363.5	+ 13.5	54.6	53.9	+ 1.3
Handbags (separately reported)	161,237.2	139,144.4	+ 15.9	429.7	372.9	+ 15.2
Nonreptile leather	21,105.2	17,956.6	+ 17.5	165.7	143.2	+ 15.7
Plastic, (other than reinforced or laminated plastic), nspf	44,530.3	48,217.0	- 7.6	99.5	101.8	- 2.3
Textile material, nspf	88,013.1	67,493.4	+ 30.4	150.3	115.8	+ 29.8
Beads, imitation gemstones, etc.	1,056.9	1,035.6	+ 2.0	2.1	1.6	+ 31.2
Paper yarns	37.2	55.0	- 32.4	0.1	0.3	- 66.7
Materials, nspf	6,494.5	4,386.8	+ 48.0	12.0	10.2	+ 17.6
Handbags & luggage (reported together), total	11,644.8	6,343.4	+ 83.6	33.6	18.2	+ 84.6
Reptile leather	249.3	117.1	+112.9	6.9	3.4	+102.9
Willow & similar unspun fibrous vegetable fibers	11,395.5	6,226.3	+ 83.0	26.7	14.8	+ 80.4
Handbags, flat goods & luggage (reported together), total	nr	nr	--	6.0	6.5	- 7.7
Reinforced or laminated plastic (thous. pounds)	408.2	704.6	- 42.1	1.6	2.6	- 38.5
Textile material, in part braid or handloomed	nr	nr	--	4.3	3.9	+ 10.3

(continued)

Imports

U.S. Imports of Specified Accessories, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Luggage (separately reported), total	nr	nr	--	$326.0	$271.1	+ 20.2%
Nonreptile leather	nr	nr	--	34.3	28.5	+ 20.4
Textile material, nspf	nr	nr	--	106.9	72.8	+ 46.8
Materials, nspf	nr	nr	--	184.8	169.8	+ 8.8
Flat goods (billfolds, key cases, etc.) (separately reported), total	nr	nr	--	96.0	81.4	+ 17.9
Leather, nspf	nr	nr	--	46.1	34.6	+ 33.2
Textile materials, nspf	nr	nr	--	26.5	17.9	+ 48.0
Materials, nspf	nr	nr	--	23.4	28.9	- 19.0
Gloves & glove linings, total	21,858.8	21,032.6	+ 3.9	173.8	176.8	- 1.7
Gloves, horse or cowhide, total (thous. dozen pairs)	4,878.2	5,102.8	- 4.4	80.5	89.0	- 9.5
All leather	1,414.7	1,581.6	- 10.5	35.8	40.9	- 12.5
Not wholly leather	3,463.5	3,521.2	- 1.6	44.7	48.1	- 7.1
Gloves, of leather, nspf, total (thous. dozen pairs)	267.6	307.1	- 12.9	15.1	18.1	- 16.6
Men's	106.5	127.7	- 16.6	5.1	6.4	- 20.3
Lined	60.2	87.8	- 31.4	3.2	4.6	- 30.4
Not lined	46.3	39.9	+ 16.0	1.9	1.8	+ 5.5
Women's or children's	161.1	179.4	- 10.2	10.0	11.7	- 14.5
Lined	149.0	166.0	- 10.2	9.3	10.8	- 13.9
Not lined	12.1	13.4	- 9.7	0.7	0.9	- 22.2
Other gloves & glove linings, (thous. dozen pairs)	16,713.1	15,622.7	+ 7.0	78.2	69.7	+ 12.2
Knit	8,143.5	6,247.2	+ 30.3	27.4	19.8	+ 38.4
Cotton	6,874.7	5,089.1	+ 35.1	17.7	11.5	+ 53.9
Textile materials, nspf	253.7	142.1	+ 78.5	5.7	3.1	+ 83.9
Man-made fibers	1,015.1	1,016.0	- 0.1	4.0	4.2	- 4.8
Not knit	8,569.6	9,375.5	- 8.6	50.8	49.9	+ 1.8
Man-made fibers	2,454.8	2,760.8	- 11.1	29.2	29.2	--
Other textile materials	6,114.8	6,614.7	- 7.6	21.6	20.7	+ 4.3

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Specified Accessories, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Mufflers, scarfs & shawls, etc., not knit, total	20,160.4	20,978.8	- 3.9%	$ 35.2	$ 31.1	+ 13.2%
Cotton	276.3	164.8	+ 67.7	0.6	0.3	+100.0
Vegetable fibers, not cotton	0.9	11.4	- 92.1	**	**	--
Wool	2,992.9	2,615.3	+ 14.4	7.8	7.1	+ 9.9
Silk, not ornamented	3,173.1	2,644.2	+ 20.0	13.3	11.0	+ 20.9
Man-made fibers	13,705.5	15,534.6	- 11.8	12.8	12.2	+ 4.9
Textile materials (thous. pounds)	11.7	8.5	+ 37.6	0.7	0.5	+ 40.0
Handkerchiefs, total (thous. doz.)	4,991.3	3,929.3	+ 27.0	17.4	14.9	+ 16.8
Cotton	4,208.6	3,357.1	+ 25.4	11.1	8.8	+ 26.1
Silk	157.8	141.3	+111.7	2.9	2.8	+ 3.6
Vegetable fibers, not cotton	124.0	112.8	+ 9.9	1.0	0.9	+ 11.1
Textile materials	500.9	318.1	+ 57.5	2.4	2.4	--
Headwear, total	nr	nr	--	136.2	104.8	+ 30.0
Vegetable material, paper & man-made fibers, nspf	nr	nr	--	44.8	34.4	+ 30.2
Wool, except felt	2,159.1	2,050.4	+ 5.3	6.3	5.6	+ 12.5
Textile material, except wool, nspf	nr	nr	--	45.4	37.8	+ 20.1
Fur not on the skin, men's & boys'	836.1	357.7	+133.7	12.6	5.4	+133.3
Felt & fur not on the skin	nr	nr	--	3.7	3.6	+ 2.8
Headband & reinforced plastic headwear or hardhats, nspf	nr	nr	--	23.4	18.0	+ 30.0
Leather belts, total	nr	nr	--	36.8	36.8	--
Umbrellas	29,384.4	34,275.5	- 14.3	48.7	56.0	- 13.0

nspf = not specially provided for

* The c.i.f. value is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

** Less than $0.1 million.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135,
December 1980, 1981.

FOREIGN TRADE

Exports

U.S. exports of jewelry slid 20.8% in value to $222 million in 1981 compared with $280.2 million the prior year. Exports of gold or platinum jewelry declined 34.2%, the largest drop registered among the jewelry categories, to $51.1 million. Costume jewelry exports were valued at $76.1 million, a gain of 6.4% over the 1980 value.

Other accessories exports rose in value compared with 1980. Watch exports increased 21.3%, handbags, 29% (including a 60% hike in leather handbag exports), leather belts, 23.3%, small personal goods, 8.3%, headwear, 7.9% and glove and glove linings, 3.8%. Handkerchiefs (-42.9%), mufflers and scarves (-12.5%) and luggage (-11.5%) exports decreased in value from 1980 levels.

U.S. Exports of Specified Accessories, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Jewelry, total	nr	nr	--	$222.0	$280.2	- 20.8%
Not precious or semiprecious	nr	nr	--	76.1	71.5	+ 6.4
Platinum or gold, set or unset	nr	nr	--	51.1	77.7	- 34.2
Rolled precious metal or sterling silver, set or unset	nr	nr	--	16.4	18.8	- 12.8
Precious stones or natural pearls	nr	nr	--	73.0	107.3	- 32.0
Cultured pearls or semiprecious stones	nr	nr	--	5.4	4.9	+ 10.2
Watches, watchcases & watch movements, total	nr	nr	--	56.9	46.9	+ 21.3
Watches	999.5	920.5	+ 8.6%	19.6	17.6	+ 11.4
Watch movements	7,743.0	5,766.4	+ 34.3	7.3	4.5	+ 62.2
Watch cases & parts thereof	nr	nr	--	30.0	24.8	+ 21.0
Handbags, total	7,581.4	4,227.0	+ 79.4	20.0	15.5	+ 29.0
Leather	381.8	197.9	+ 92.9	4.0	2.5	+ 60.0
Plastics	6,113.7	2,956.9	+106.8	6.6	4.9	+ 34.7
All other materials	1,085.9	1,072.2	+ 1.3	9.4	8.1	+ 16.0
Flat goods (billfolds, key cases, etc.), total	nr	nr	--	9.1	8.4	+ 8.3
Leather	nr	nr	--	2.6	3.1	- 16.1
Non-leather	nr	nr	--	6.5	5.3	+ 22.6
Luggage, total	nr	nr	--	48.3	54.6	- 11.5

(continued)

Exports

U.S. Exports of Specified Accessories, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Handkerchiefs, total	3,421.2	7,100.4	- 51.8%	$ 1.2	$ 2.1	- 42.9%
Cotton	2,738.4	5,190.0	- 47.2	0.9	1.6	- 43.7
Man-made fibers	344.4	812.4	- 57.6	0.1	0.2	- 50.0
All other textile fibers	338.4	1,098.0	- 69.2	0.2	0.3	- 33.3
Mufflers, scarves & shawls	1,137.6	1,450.8	- 21.6	0.7	0.8	- 12.5
Gloves & glove linings (thous. doz.), total	2,531.1	2,196.7	+ 15.2	27.6	26.6	+ 3.8
Cotton	726.8	694.7	+ 4.6	5.0	4.3	+ 16.3
Wool	26.1	4.1	+536.6	0.2	**	+472.7
Man-made fibers	172.4	121.4	+ 42.0	1.4	1.1	+ 27.3
All other textile materials	606.2	488.7	+ 24.0	5.4	4.4	+ 22.7
Leather or of fur on the skin	419.5	381.4	+ 10.0	8.1	11.3	- 28.3
Material, nspf	580.1	506.4	+ 14.5	7.5	5.3	+ 41.5
Leather belts, total	nr	nr	--	7.4	6.0	+ 23.3
Headwear, total (thous. doz.)	2,087.0	2,572.3	- 18.9	30.1	27.9	+ 7.9
Reinforced or laminated plastics	673.3	898.7	- 25.1	9.6	9.3	+ 3.2
Rubber or plastic, except reinforced or laminated plastics	460.6	328.0	+ 40.4	5.5	4.4	+ 25.0
Other headwear, except rubber or plastic	953.1	1,345.6	- 29.2	15.0	14.2	+ 5.6

nr = not reported.
nspf = not specified by kind.
* The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.
** Less than $0.1 million.

Source: U.S. Bureau of the Census,
U.S. Exports FT 410,
December 1980, 1981.

FASHION ACCESSORIES

At the Retail Level

THE SIZE OF THE POTENTIAL MARKET

Resident Male Population of the U.S., 1981 & Projections to 1995*
(In Millions)

				% Change	Percent of Male Population		
	1981	1985	1995	1995/1981	1981	1985	1995
Total, all ages	111.4	116.1	126.3	+ 13.4%	100.0%	100.0%	100.0%
Under 15 years	26.2	26.5	29.0	+ 10.7	23.5	22.8	23.0
15 years & older	85.2	89.6	97.3	+ 14.2	76.5	77.2	77.0
15-19 years	10.4	9.4	8.7	- 16.3	9.3	8.1	6.9
20-24 years	10.9	10.8	8.7	- 20.2	9.8	9.3	6.9
25-34 years	19.3	20.9	20.4	+ 5.7	17.3	18.0	16.1
35-44 years	13.0	15.8	20.9	+ 60.8	11.7	13.6	16.5
45-54 years	10.9	10.9	15.3	+ 40.4	9.8	9.4	12.1
55-64 years	10.3	10.4	9.9	- 3.9	9.2	9.0	7.8
65 years & older	10.6	11.5	13.4	+ 26.4	9.5	9.9	10.6
Median age	29.1	30.2	33.3				

Resident Female Population of the U.S., 1981 & Projections to 1995*
(In Millions)

				% Change	Percent of Male Population		
	1981	1985	1995	1995/1981	1981	1985	1995
Total, all ages	117.9	122.5	133.3	+ 13.1%	100.0%	100.0%	100.0%
Under 15 years	25.0	25.3	27.7	+ 10.8	21.2	20.7	20.8
15 years & older	92.9	97.2	105.6	+ 13.7	78.8	79.3	79.2
15-19 years	10.0	9.0	8.3	- 17.0	8.5	7.3	6.2
20-24 years	10.8	10.5	8.4	- 22.2	9.2	8.6	6.3
25-34 years	19.6	20.9	20.1	+ 2.5	16.6	17.1	15.1
35-44 years	13.5	16.2	21.1	+ 56.3	11.5	13.2	15.8
45-54 years	11.6	11.6	16.1	+ 38.8	9.8	9.5	12.1
55-64 years	11.7	11.8	11.1	- 5.1	9.9	9.6	8.3
65 years & over	15.7	17.2	20.6	+ 31.2	13.3	14.0	15.4
Median age	31.6	32.8	36.0				

*These are middle-level projections, which assume a fertility rate of 1.9 births per woman, as well as middle-level mortality and immigration rates.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25 Nos. 917, 922.

THE SIZE OF THE POTENTIAL MARKET

The two age groups whose ranks will increase the most between 1981 and 1995 are those aged 35-44 and persons 65 and up, according to current Census Bureau projections. While the number of persons over 15 is expected to grow 13.9% to approximately 203 million, men and women aged 35-44 will rise 60.8% and 56.3%, respectively.

Demographic trends, in general, favor the fashion accessories market. A sizeable portion of the postwar baby boom will be moving into higher earning brackets and buying more luxury goods. The typical American household is becoming smaller, older and more affluent, with a large share having two or more incomes.

Working Women

An average of 47.9 million women were employed or looked for work in 1982, 52.7% of the 90.7 million women aged 16 and over in the U.S. Slightly more than half (51.5%) of women with husbands in the labor force were part of it themselves in 1982.

By 1995, the labor force participation rate for women was projected by the Bureau of Labor Statistics to be 61.2%. In that year, as in 1981, the highest participation rate will be reached among 20-24 year olds (85.3%). Women will account for two-thirds of the estimated 24.6 million person increase in the labor force from 1980 to 1995.

Civilian Labor Force Participation Rates for Women
By Specified Age Groups, 1982 & Projections for 1985, 1995

	Participation Rates (% of Age Group Population)		
	1982	1985*	1995*
Females, 16 years & older	52.6%	56.5%	61.2%
By age group:			
16 & 17 years	41.0	59.8	66.3
18 & 19 years	61.2		
20-24 years	69.8	76.5	85.3
25-34 years	68.0	75.1	83.7
35-44 years	68.0	72.9	81.7
45-54 years	61.6	61.7	66.2
55-64 years	41.8	41.6	42.3
65 years & older	7.9	7.7	6.8

*Population projections by age group assume a fertility rate at the replacement level, based on projections made from 1970 census figures. Total labor force growth rates assume a 1.8% annual growth rate from 1979 to 1985 and a 1.0% annual increase from 1985 to 1995.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings,
January 1983;
Monthly Labor Review, December 1980.

THE SIZE OF THE POTENTIAL MARKET

Working Women

Increasingly, women are being employed in "white-collar" occupations, many of which require that they dress-up for work. Almost a quarter of all employed women in 1981 were involved in professional-technical positions or as managers and administrators, compared with 19% of employed women in 1972. According to the 1982 Current Population Survey, nearly half a million more women worked in these occupations in 1982 than the previous year. Almost 60% of these women were employed in traditionally male-dominated fields such as computer specialists, engineering and law.

About 70% of working women in 1982 were full-time workers whose median income was $241 per week, up 7.6% over the 1981 median. After adjusting for inflation, this typical paycheck represented a 1.5% boost in purchasing power. Since 1979, the median weekly income of a full-time female worker rose 30% while the median for males increased 24%.

THE BRIDAL MARKET

For the sixth consecutive year, the number of marriages performed in the U.S. rose, reaching 2.44 million in 1982, 1% more than in 1981. During the decade of the 1980's, according to trade sources, the number of marriages will eclipse the 22.3 million performed during the previous decade by 7.4%, providing an expanded market for engagement and wedding rings.

More than two-thirds of first-time brides received an engagement ring with an average karat weight of 30 points. The average diamond engagement ring sold for an estimated $700 in 1980 versus $585 in 1979. Sales of engagement and wedding rings for both the bride and the groom was an estimated $575 million business in 1980.

Monthly Patterns in Marriages, 1981

	Marriages	
	Number* (Thous.)	% of Total
Total	2,438	100.0%
January	135	5.5
February	156	6.4
March	147	6.0
April	198	8.1
May	235	9.6
June	287	11.8
July	237	9.7
August	252	10.3
September	216	8.9
October	204	8.4
November	172	7.0
December	200	8.2

* Provisional

Source: Based on U.S. Department of Health & Human Services, Monthly Vital Statistics Report, March 1982.

RETAIL SALES

There is a dearth of information on the value of the retail market for accessories as a whole. The Department of Commerce reports that the total value at retail of all apparel reaching consumers in 1981 (including through other than retail outlets) amounted to $62.7 billion for women's and children's and $32.7 billion for men's and boys', for a grand total of $95.4 billion.

This Fact File concentrates on specific types of fashion accessories. Other merchandise often included in the accessory classification by retailers are covered in other Fact Files (including the Hosiery/Legwear and Men's Furnishings Fact Files).

If it is assumed that all accessories represented about 10% of total consumer expenditures for apparel, that would mean a market for the broadly-defined classification totaling some $9.5 billion. This does not include spending for jewelry or watches. One source places the value of all women's fashion accessories, excluding jewelry & watches at over $7.0 billion.

Reports from National Panel Diary's consumer panel, which consists of 6,500 nationally representative households, showed that purchases of women's accessories in 1982 were essentially flat in terms of dollars but fell 10.5% in the number of units sold.

Purchases of men's accessories by NPD panel members in 1982 were off 1.7% in dollars and 6.8% in units.

Percent Change in Reported Purchases of Men's & Women's Accessories 1981 vs. 1982

	% Change 1982/1981	
	Units	Dollars
Women's accessories		
Handbags	- 11.3%	- 6.7%
Gloves/mittens	- 8.8	+ 14.0
Belts	+ 5.2	+ 30.0
Scarfs/shawls	- 20.6	- 18.1
Hats	- 12.2	+ 7.8
Handkerchiefs	- 20.1	- 2.5
Wallets	- 33.3	- 17.6
Other accessories	+ 10.7	+ 73.8
Total	- 10.5	- 0.4
Men's accessories		
Gloves/mittens	- 8.5	+ 1.2
Belts	- 11.2	- 6.6
Scarfs/shawls	- 13.5	+ 10.7
Hats	- 23.3	- 26.3
Caps	- 11.9	+ 15.7
Handkerchiefs	- 9.5	+ 2.1
Wallets	- 34.1	- 36.6
Other accessories	+ 11.8	+ 34.3
Total*	- 6.8	- 1.7

* Includes men's ties.

RETAIL SALES

Personal consumption expenditures for all types of men's and women's jewelry and watches reached $12.9 billion in 1981, a considerable 14.4% jump over 1981. The 1981 dollar amount spent on jewelry and watches accounted for 0.7% of total U.S. personal consumption expenditures.

Personal Consumption Expenditures for Jewelry & Watches, 1979-1981
(Millions of $)

	1981	1980	1979	% Change 1981/1980	% Change 1981/1979
Jewelry & watches, total	$12,915	$11,287	$9,537	+ 14.4%	+ 35.4%

Source: Department of Commerce,
Office of Business Economics.

By Type of Retail Outlet

The 1977 Census of Retail Trade contains the only official information available on sales of men's and women's accessories in various types of retail outlets with payrolls. Not all store types broke out sales in detail, but the following information reflects sales in major outlet types. Comparative sales figures for prior census years are not available due to changes in the merchandise classification system.

Sales of men's accessories reported by leading outlet types amounted to a total of $1.2 billion in 1977. Department stores accounted for $704.4 million, or 59.3% of this total.

Reported Sales of Men's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's accessories (hats, gloves, belts, wallets, umbrellas, etc.)	36,426	100.0%	$1,187.0	100.0%
Department stores**	7,244	19.9	704.4	59.3
Men's wear stores	14,696	40.3	307.4	25.9
Family clothing stores	10,246	28.1	135.9	11.5
Other (women's ready-to-wear stores, men's shoe stores & mail order houses)	4,240	11.6	39.3	3.3

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

** Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

RETAIL SALES

By Type of Retail Outlet

Percent of Total Men's and Boys' Wear Sales Accounted For By Men's Accessories Sales in Key Store Types, 1977

	Total Men's & Boys' Wear Sales* (Mil. $)	% of Total Accounted For By Men's Accessories
Department stores**	$10,574.9	6.7%
Men's wear stores	6,275.4	4.9
Family clothing stores	3,001.5	4.5

*Excludes men's & boys' footwear sales.
**See footnote for the preceding table.

Source for both tables:
U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Women's handbag and small leather goods sales reported by the major outlet types reached $1.2 billion in 1977. Of this total, department stores accounted for 56.1%, or $667.9 million.

Department stores were responsible for 67.6% of the $253.0 million in sales of women's hats, hairpieces and trimmings in the major outlet types during 1977, according to the census reports. In reported sales of other women's accessory items such as gloves, neckwear, belts and umbrellas, department stores accounted for 54.8% of the $977.5 million volume done by the major store types.

However, it should be noted that these accessories are also sold in other outlet types (variety stores, supermarkets, as well as specialized accessory stores, sporting good stores, etc.) for which sales are not available.

Reported Sales of Specified Women's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's handbags & small leather (and plastic) goods	46,765	100.0%	$1,190.5	100.0%
Department stores**	7,727	16.5	667.9	56.1
Women's ready-to-wear stores***	18,311	39.2	234.3	19.7
Family clothing stores	8,972	19.2	96.2	8.1
Shoe stores	8,450	18.1	126.5	10.6
Mail order houses	3,305	7.1	65.6	5.5

(contined)

RETAIL SALES

By Type of Retail Outlet

Reported Sales of Specified Women's Accessories by Store Type, 1977

(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's accessories (gloves, neckwear, belts, umbrellas, etc.)	40,585	100.0%	$ 977.5	100.0%
Department stores**	7,120	17.5	536.0	54.8
Women's ready-to-wear stores***	20,657	50.9	306.4	31.4
Family clothing stores	8,848	21.8	103.0	10.5
Other stores (men's wear stores, shoe stores & children's wear stores)	938	2.3	12.9	1.1
Mail order houses	3,022	7.5	19.2	2.0
Women's hats, trimmings, etc.	12,982	100.0	253.0	100.0
Department stores**	5,557	42.8	171.1	67.6
Women's ready-to-wear stores***	4,524	34.8	40.8	16.1
Millinery stores	256	2.0	20.5	8.1
Family clothing stores	2,299	17.7	14.4	5.7
Mail order houses	346	2.7	6.2	2.5

* and ** See footnotes on table of men's accessories sales.

***Does not include sales in women's accessory and specialty stores (handbag stores, glove stores, etc.) Sales in these stores totaled $494.5 million in 1977, in 2,937 outlets with payrolls.

Percent of Total Women's and Children's Wear Sales Accounted For By Sales of Specified Accessories in Key Store Types, 1977

	Total Women's & Children's Wear Sales* (Mil. $)	% Accounted For By:		
		Handbags, Small Leather Goods	Hats, Hair-pieces	Accessories (gloves, belts, etc.)
Department stores**	$ 16,250.7	0.9%	0.2%	0.7%
Women's ready-to-wear stores***	11,066.5	1.9	0.3	2.5
Family clothing stores	3,471.6	1.2	0.2	1.3

* Excludes women's and children's footwear sales.

** See footnote on table of men's accessories sales, page 35.

*** Does not include sales in women's accessory and specialty stores.

Source for both tables: Based on U.S. Bureau of the Census Census of Retail Trade, 1977, Merchandise Line Sales RC77-L.

RETAIL SALES

By Type of Retail Outlet

Men's and women's jewelry sales in the major store types were reported at $8.15 billion in 1977, according to the census of retail trade. In this report, jewelry sales include not only both precious metal and costume jewelry, but also watches. As previously noted, not all store types broke out sales in detail; therefore, sales of jewelry in supermarkets and other type stores are not included in the table below.

Reported Sales of Jewelry by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Jewelry	110,575	100.0%	$8,150.8	100.0%
Department stores**	8,355	7.6	1,753.9	21.5
Women's wear stores	9,546	8.6	156.2	1.9
General merchandise stores (except variety & department)	7,107	6.4	675.9	8.3
Jewelry stores & miscellaneous stores	27,828	25.2	4,465.0	54.7
All other store types	53,779	48.6	739.3	9.1
Non-store retailers (mail order houses & direct selling)	3,960	3.6	360.5	4.4

**(See footnotes on table of men's accessories sales, page 35.)

Percent of Total Store Sales Accounted for by Jewelry Sales In Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Accounted For By Jewelry
Department stores**	$76,909.4	2.3%
Women's wear stores	13,163.8	1.1
General merchandise stores (except variety & department stores)	9,597.7	7.0
Jewelry stores	5,010.5	85.6

**See footnote on table of men's accessories sales, page 35.

Source for both tables: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

RETAIL SALES

By Type of Retail Outlet

Merchandising and operating results in three major store types selling accessories are reported below. Data on the total number of stores in 1980 and their total sales of all merchandise in recent years are also shown.

Trends of Total Sales in Major Apparel Store Types, 1980 - 1982

	Number of Stores	Sales	
		Mil. $	% Change From Previous Year
Department stores			
1982(p)	na	106,305	+ 3.0%
1981(r)	na	103,232	+11.4
1980(r)	9,240	92,669	+ 3.0
Men's & boys' wear stores			
1982(p)	na	7,613	- 2.2
1981	na	7,786	- 0.6
1980	18,106	7,830	--
Women's ready-to-wear stores			
1982(p)	na	17,449	+ 6.7
1981	na	16,352	+ 8.5
1980	39,969	15,074	+ 0.6

(p) = preliminary
(r) = revised
na = not available

Source: U.S. Bureau of the Census,
Monthly Retail Sales;
County Business Patterns, 1980.

RETAIL OPERATING RATIOS

Department Stores

The median double-digit sales increase in 1981 of several accessory items--handbags, small leather goods, men's accessories and miscellaneous apparel accessories--outpaced the typical 6.7% sales rise of the entire upstairs store in department stores with sales over $1 million. According to the annual Merchandising and Operating Results report issued by the National Retail Merchants Association, sales of fine jewelry and watches were up only 4.3% over 1980 while costume jewelry sales gained a median 7.2%.

At $449.60 per square foot, typical sales in the fine jewelry and watches department were approximately four times the size of sales per square foot for the whole upstairs store ($111.80). Luggage was the sole accessory item whose ratio of sales to square foot of selling space ($65.50) was below the upstairs store median.

Department Stores

Merchandising & Operating Results of Specified Accessories In Department Stores With Total Sales Over $1 Million, 1981

(Median Results)

	Women's Accessories			
	Fine Jewelry/ Watches (35)#	Costume Jewelry (91)#	Gloves (75)#	Handbags (64)#
Net sales, % change from last year	+ 4.3%	+ 7.2%	+ 5.4%	+ 13.4%
Sales, % to total store sales	1.4	1.7	0.5	1.5
Net sales, % of merchandise division***	12.2	14.2	4.6	12.0
$ sales per square foot of selling space (main or largest selling unit)	$449.6	$217.0	$175.3	$138.8
Gross margin, % of sales	44.2%	47.8%	49.7%	48.3%
Number of stock turns (times)	1.6	2.8	3.6	3.6

	Women's Accessories			
	Small Leather Goods (61)#	Misc. Apparel Accessories* (101)#	Men's Accessories** (44)#	Luggage (99)#
Net sales, % change from last year	+ 10.4%	+ 11.1%	+ 13.5%	+ 3.8%
Sales, % to total store sales	0.4	0.9	0.8	0.6
Net sales, % of merchandise division***	3.4	7.2	10.2	18.1
$ sales per square foot of selling space (main or largest selling unit)	$205.0	$138.4	$332.5	$ 65.5
Gross margin, % of sales	48.1%	48.9%	50.5%	44.7%
Number of stock turns (times)	3.1	3.0	3.0	1.7

* Women's miscellaneous apparel accessories include neckwear, scarfs, handkerchiefs, umbrellas, folded rain accessories and belts.

** Men's accessories include ties, handkerchiefs, jewelry, small leather goods, gloves, mufflers, toiletries & umbrellas.

*** For women's accessories, the merchandise division is adult female intimate apparel and accessories; for men's accessories, adult male apparel; for luggage, hobby, recreation & transportation.

# Number in parentheses refers to the number of reporting firms in each category.

Source: National Retail Merchants Association
"Merchandising & Operating Results of 1981"

Women's glove sales shot up 14.4% in 1981 in specialty stores with total sales over $1 million, according to the National Retail Merchants Association annual Merchandising and Operating Results report. Handbag and small leather goods sales increased 13.9% in 1981 compared to overall store average of 8.3%. Jewelry and watch sales lagged behind, only 1.9% ahead of 1980 sales.

RETAIL OPERATING RATIOS

Women's Specialty Stores

Merchandising & Operating Results of Specified Accessories In Women's Specialty Stores With Total Sales Over $1 Million, 1981

	Total Store (48)**	Women's Accessories			
		Jewelry & Watches (23)**	Handbags & Small Leather Goods (23)**	Gloves (13)**	Misc. Apparel Accessories* (29)**
Net sales, % change from last year	+ 8.3%	+ 1.9%	+ 13.9%	+ 14.9%	+ 6.3%
Sales, % to total store sales	100.0	2.5	2.9	0.8	2.0
Net sales, % of merchandise division#	--	15.4	17.1	5.2	11.1
$ sales per square foot of selling space (main or largest selling unit)	$157.3	$228.5	$142.9	$207.7	$220.8
Gross margin, % of sales	43.3%	46.2%	45.3%	47.7%	45.8%
Number of stock turns (times)	3.1	2.1	3.2	3.2	3.0

* Women's miscellaneous apparel accessories include neckwear, scarfs, handkerchiefs, umbrellas, folded rain accessories and belts.
** Number in parentheses refers to the number of reporting firms in each category.
# For women's accessories, the merchandise division is adult female intimate apparel and accessories.

Source: National Retail Merchants Association
"Merchandising & Operating Results of 1981"

Men's Wear Stores

While sales in men's wear stores surveyed by the Menswear Retailers of America rose 5.3% in 1981, accessory sales moved up only 1.7% from 1980 levels. Men's belts turned in a better 1981 performance with an increase in sales of 7.8%.

Merchandising & Operating Results of Men's Accessories In Men's Wear Stores, 1981

	Total Store	Men's Accessories	Men's Belts
% change in sales from last year (60)*	+ 5.3%	+ 1.7%	+ 7.8%
% to total store sales (71)*	100.0	2.2	1.1
% to total sales in merchandise division** (71)*	--	12.8	6.1
% distribution of average inventory within merchandise division** (71)*	--	17.2	7.7
Number of stock turns (times) (37)*	1.9	1.6	1.5
Markdowns, % of sales (45)*	12.9	6.9	4.3

* Number in parentheses refers to the number of reporting firms in each category.
** Merchandise division for accessories and belts is men's furnishings.

Source: Menswear Retailers of America
1981 Annual Business Survey

RETAIL SALES BY MONTH

In a typical month, sales of women's handbags and small leather goods in department stores account for 4.1% of women's apparel and accessories sales. Three of the four specified accessory items hit their sales peak, as a percentage of total departmental sales, in December--handbags and small leather goods (5.9%), women's and children's gloves (3.6%) and women's and misses' neckwear and scarfs (3.6%). The exception is millinery, which accounts for its highest portion of apparel and accessory sales in March (3.7%).

Percent of Total Women's Apparel & Accessories Sales in Department Stores Accounted For by Specified Accessories, by Month

	Handbags & Small Leather Goods	Millinery	Women's & Children's Gloves	Women's & Misses' Neckwear & Scarfs
January	3.0%	2.0%	1.9%	2.2%
February	3.6	2.4	1.6	2.6
March	3.8	3.7	1.8	2.4
April	4.0	3.2	1.8	2.6
May	4.5	1.8	1.4	2.7
June	4.1	1.5	1.1	3.0
July	3.6	1.4	0.9	2.7
August	3.2	1.9	1.0	2.3
September	4.0	3.0	1.5	2.6
October	3.8	2.9	2.4	2.9
November	4.3	2.3	2.8	2.8
December	5.9	1.5	3.6	3.6
5 year average	4.1	2.2	2.0	2.8

Source: Newspaper Advertising Bureau, based on Federal Reserve Board data (1961-1965), latest available figures.

RETAIL ADVERTISING

Percent of 1981 Newspaper Advertising Linage of Specified Accessories Used Each Month

	Fine Jewelry	Handbags	Luggage
Total linage	100.0%	100.0%	100.0%
January	3.1	4.2	6.0
February	6.5	4.9	7.0
March	5.7	8.6	8.5
April	7.0	11.0	5.9
May	10.8	10.9	11.5
June	6.8	3.9	8.9
July	3.6	5.7	4.9
August	5.9	8.5	10.1

(continued)

RETAIL ADVERTISING

Percent of 1981 Newspaper Advertising Linage of Specified Accessories Used Each Month
(continued)

	Fine Jewelry	Handbags	Luggage
September	6.2%	9.0%	5.5%
October	8.1	8.8	6.9
November	16.6	10.4	11.2
December	19.7	14.1	13.6

Source: The Advertising Checking Bureau, Inc. Neustadt Reports Div., covering retail newspapers in seven cities - Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles & Washington.

CONSUMER BUYING HABITS

In May 1982, 1,010 teenage girls, members of Seventeen Magazine's 2,000-member Consumer Panel, which represents a cross-section of teens nationwide, answered the magazine's Spring Apparel Study on the apparel and accessory items they purchased during the preceding year. This information was then projected to the entire female teenage market to get estimates of the total number of girls who purchased accessories, the number purchased and the amount spent on them.

The survey estimated that in the year preceding the study, 12.7 million teenage girls bought 117.5 million assorted accessories for which they spent a combined $1.4 billion. Handbag purchases accounted for the largest dollar volume, $286.2 million.

Purchases of Specified Accessories by Teenage Girls

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures ($000)
Jewelry			
Necklaces	11,863	16,739	$ 153,329
Pins	6,531	10,812	75,360
Earrings	6,372	15,717	151,041
Bracelets	3,710	7,568	76,059
Watches	2,406	2,887	183,931
Belts			
Leather	4,880	8,735	109,013
Suede	59	62	924
Other	7,518	13,365	85,269

(continued)

Purchases of Specified Accessories by Teenage Girls
(continued)

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures ($000)
Scarfs			
Cotton	1,784	2,914	$ 19,699
Silk	1,149	1,685	19,293
Woven	490	659	5,299
Knit	269	379	2,134
Gloves			
Knit	1,873	2,185	19,731
Leather	268	294	5,469
Hats			
Knit	1,131	1,747	19,933
Felt	436	446	5,366
Handbags	8,273	16,913	286,168
Wallets/billfolds/key cases	3,107	5,075	61,611
Sunglasses	5,539	7,324	123,336
Umbrellas	1,472	1,963	21,750
Total girls buying accessories	12,771	117,469	$1,424,715

Source: Seventeen Magazine,
1982 Spring Apparel Study.

A buying intentions study, commissioned by Chain Store Age and conducted by Leo Shapiro & Associates among 9,000 nationally representative households, found only 2.4% of U.S. households might purchase luggage during 1983. Two demographic groups stand out as having higher-than-expected luggage buying intentions. Almost one-fifth of respondents aged 20-24 plan to buy, as do an unspecified percentage of members of five-person households whose total income exceeds $40,000.

Of all those who expect to purchase luggage in 1983, 17.7% plan to spend under $50 while an additional 15.5% anticipate spending between $100 and $150 for luggage. More than half of the total potential luggage customers expect to buy brand names.

Prices Consumers Expect to Pay for Luggage in 1983

Price Points	% of Respondents*
Under $50	17.8%
$51 - $99	13.1
$100 - $149	15.5
$150 - $299	12.9
$300 & over	10.5
No answer	30.2

* Percent of respondents who expect to purchase luggage in 1983.

Source: Chain Store Age,
General Merchandise Edition,
December 1982

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (June)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00) (1982 Edition available now -- 1983 Edition will be available in July, 1983)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season. (May)

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00) (May)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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